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ABSTRACT

This document consists of a curriculum guide combined with separately published "Simulations" and "Test Bank" volumes designed to support instructors using the curriculum guide. The curriculum guide was developed to provide instructional materials to teachers of office support systems courses in Texas. The guide contains the following : (1) essential elements; (2) suggested scope and sequence; and (3) an outline of the course content with suggested lesson plans for each unit, including suggested teacher activities and resources. Three appendixes include reference addresses, an equipment list, and suggested modifications of the course for students with disabilities. The following eight topics are covered in the curriculum: introduction to office support systems, keyboarding, employment, filing, processing mail, business operations, financial management, and communications. (KC)

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OFFICE SUPPORT SYSTEMS CURRICULUM GUIDE

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PREFACE

The curriculum for the Office Support Systems was prepared to provide quality instructional materials for instructors of Office Support Systems courses in Texas. This guide serves as a basis for achieving the Office Education common essential elements mandated by the Texas Education Agency.

This curriculum guide has been developed through a joint effort of the Texas Education Agency and the Occupational Curriculum Laboratory located on the campus of East Texas State University at Commerce, Texas.

The purpose of developing this guide is to provide Office Education instructors with a comprehensive curriculum guide that includes detailed units of instruction correlated directly to the essential elements. Suggestions and comments concerning these curriculum guides are requested to be sent to the curriculum specialist at the Occupational Curriculum Laboratory.

OFFICE EDUCATION ESSENTIAL ELEMENTS

OFFICE SUPPORT SYSTEMS

75.87

- (i) Office support systems (1/2 or one unit) shall include the following essential elements:
- (1) Concepts and skills involved in keyboarding. The student shall be provided opportunities to:
 - (A) demonstrate the skill of keyboarding letters, memos, forms, and reports;
 - (B) apply appropriate procedures for proofreading and correcting errors; and
 - (C) demonstrate and identify information processing concepts in keyboarding.
 - (2) Concepts and skills necessary for filing. The student shall be provided opportunities to:
 - (A) demonstrate procedures used in alphabetic, numeric, subject, and geographic filing; and
 - (B) identify procedures used in electronic filing.
 - (3) Concepts and skills necessary for financial activities. The student shall be provided opportunities to:
 - (A) demonstrate the ability to maintain a checking account; and
 - (B) demonstrate the procedures involved in preparing a payroll and preparing tax reports.
 - (4) Concepts and skills necessary for processing mail. The student shall be provided opportunities to:
 - (A) identify the procedures involved in processing incoming and outgoing mail; and
 - (B) identify the procedures involved in transmitting mail electronically.
 - (5) Concepts and skills necessary for effective communications. The student shall be provided opportunities to:
 - (A) identify and use proper business techniques when using the telephone;
 - (B) prepare effective written communications; and
 - (C) identify and use proper language usage skills in business.

- (6) Concepts and skills necessary for effective understanding of business operations. The student shall be provided opportunities to:
 - (A) describe the role of business in the enterprise system; and
 - (B) identify the general responsibilities of employees.
- (7) Concepts and skills necessary for securing and maintaining employment. The student shall be provided opportunities to:
 - (A) demonstrate the skills necessary for job application and interview; and
 - (B) apply human relations skills and the ability to work with others.

SUGGESTED SCOPE AND SEQUENCE

OFFICE SUPPORT SYSTEMS

SECTION/UNIT	TITLE	1/2 YEAR (in hrs)	1 YEAR (in hrs)
I.	INTRODUCTION TO OFFICE SUPPORT SYSTEMS	3	6
II.	KEYBOARDING		
	Information Processing Concepts	5	10
	Proofreading and Correcting Errors	10	20
	Keyboarding Applications	10	20
III.	EMPLOYMENT		
	Securing Employment	2	5
	Maintaining Employment	2	5
	Human Relation Skills	4	10
IV.	FILING		
	Alphabetical Filing	5	15
	Numerical Filing	3	6
	Other Filing Systems	2	4
V.	PROCESSING MAIL		
	Incoming and Outgoing Mail	2	4
	Electronic Mail	2	5
VI.	BUSINESS OPERATIONS		
	Role of Business in Free Enterprise System	2	6
	Responsibilities of Employees	2	6
VII.	FINANCIAL MANAGEMENT		
	Checking Account	3	6
	Payroll and Tax Reporting	3	6

VIII. COMMUNICATIONS

Communication Skills	5	10
Writing Skills	5	10
Telephone Skills	5	10

IX. CLOSURE	2	4
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SECTION I

INTRODUCTION TO OFFICE SUPPORT SYSTEMS

This section provides an introduction to the course Office Support Systems. The section includes an overview of the purpose, objectives, and course contents. Additional subjects such as classroom organization, management, and safety precautions are also included.

This section does not address the essential elements developed for Office Support Systems. It does address one common essential element on Safety.

SUGGESTED UNIT LESSON PLAN

SECTION I: INTRODUCTION TO OFFICE SUPPORT SYSTEMS

UNIT I: INTRODUCTORY LESSON

ESSENTIAL ELEMENT:	None	ALLOCATED TIME:	3/6 Hours
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**UNIT
OBJECTIVE:** Students will gain an understanding of the purpose, contents, and organization of the course Office Support Systems.

**STUDENT
COMPETENCIES:** After completing this unit, the student will be able to:

1. Relate the purpose of Office Support Systems to office education, business, and industry.
2. Recognize the role of the youth organization relative to Office Support Systems.
3. Discuss course objectives, equipment, units, competencies, and evaluation measures.
4. Explain classroom organization, management, and evaluation measures.
5. Identify safety precautions.

FOCUS: Students will be provided the opportunity to develop and use both academic and vocational skills that will be useful whether taking advanced courses or making the transition from high school to the world of work.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Purpose of Course
 - A. Introduction to Office Education
 - 1. Purpose
 - 2. Benefits
 - 3. Youth Organization
 - B. Objectives of Office Support Systems
 - C. Relationship to Business and Industry
- II. Overview of Course
 - A. Classroom Equipment
 - B. Units of Instruction
 - C. Competencies
 - D. Evaluation Measures
 - E. Classroom Organization and Management
 - F. Safety

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

The purpose of Section I, "Introduction to Office Support Systems," is to assist you with introducing the course to your students. The introduction is beneficial to both you and the students. It provides you the opportunity to present any policies, procedures, expectations, and other relative information which enhances classroom instruction and operations. It establishes a working environment for the students and presents an overview for the year's work.

It is suggested that you add other subject matter and instructional materials relative to your teaching assignment. Because of the purpose of this section, student activities and evaluation measures have not been included. Some of the teaching activities can be used to develop student activities. It is recommended that some method for assessing student learning be conducted.

1. Design a bulletin board showing the relationship of Office Support Systems to office education. A suggestion might be: "Under the Umbrella of Office Education." List cluster courses and specific courses, highlighting Office Support Systems.
2. Ask questions at the beginning of the course, such as:
 - a. Why are you taking this course?
 - b. What does the title, "Office Support Systems," suggest to you?
 - c. What do you think the course content covers?
 - d. What is vocational education?
 - e. What is office education?
3. Show and discuss transparency, "Benefits of Office Education."
4. Show and discuss transparency, "Learning through Office Support Systems."
5. Ask students to write down likes and dislikes of office occupations. Invite someone who works in an office to respond. Inform the speaker in advance of the nature of the assignment. Securing a person with speaking abilities would enhance the image of office employees.
6. Post data on job market projections. Update periodically (throughout the year) with projections from different resources.
7. Invite a former office education student to discuss Business Professionals of America. Be sure to inform the speaker in advance what topic you want covered in the presentation. You may want to include a question and answer period.
8. Invite a current student who is/was a member of the youth organization from last year to discuss the organization and answer questions.
9. Review youth conferences with students. Competitive events guidelines could be distributed and discussed.
10. Develop an orientation presentation to the office machines and/or equipment in the classroom. Disseminate a listing of the equipment and machines including the name and the function of each.
11. Review and/or demonstrate the office machines and equipment with the class.

OSS/Introduction to Office Support Systems
Unit 1: Introductory Lesson

12. Develop, disseminate, and discuss handout covering classroom policies and procedures. Let students make suggestions for others.
13. Divide the class into groups. As a group assignment, ask students to add to the list of safety precautions. Discuss results.
14. Invite a guest speaker for safety from: fire department, police department, personnel director, or safety engineer.
15. Disseminate the terminology page. Review the list with the students. Ask that they add to the list any terms which they do not understand. Periodically review the lists with the students. One suggestion is that students identify the term and see if one of the class members knows the meaning.
16. Invite an officer worker to speak to the class on the importance of job competency.
17. Show a film relative to one of the topics: work world, fire precautions, or others.

SECTION II: KEYBOARDING

ESSENTIAL ELEMENT

75.87(i)(1)

1. Concepts and skills involved in keyboarding.

The students shall be provided opportunities to:

- (A) demonstrate the skill of keyboarding letters, memos, forms, and reports;
- (B) apply appropriate procedures for proofreading and correcting errors; and
- (C) demonstrate and identify information processing concepts in keyboarding.

SUGGESTED UNIT LESSON PLAN

SECTION II: KEYBOARDING

UNIT I: INFORMATION PROCESSING CONCEPTS

ESSENTIAL ELEMENT:	75.87 (i)(1)(C)	ALLOCATED TIME:	5/10 Hours
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**UNIT
OBJECTIVE:** The instruction provided in this unit will assist students in developing concepts and building skills needed to process information accurately and quickly using the keyboard.

**STUDENT
COMPETENCIES:** After completing this unit, the student should be able to:

1. Explain terms used in information processing.
2. Discuss the capabilities of the electric, the electronic, and the microcomputer keyboards.
3. Demonstrate appropriate keyboarding position.
4. Keyboard with continued progress in speed and accuracy.
5. Use special keys on the electronic and the microcomputer keyboards.

FOCUS: Keyboarding still remains the principal method for original data entry. Computer keyboarding continues to gain momentum. Some forecasters are predicting that by the twenty-first century, the computer will be used in eighty percent of the jobs. Attaining keyboarding skills should be considered as a priority for persons entering the work force or pursuing additional education.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Review of information processing
- II. Types of word processing equipment
 - A. Electric typewriters
 - B. Electronic typewriter
 - C. Microcomputers
 - D. Similarities of the electric, the electronic, and the microcomputer keyboard
 - 1. Keyboarding position
 - 2. Standard keys
 - 3. Operating controls
 - 4. Rules for safe operations
- III. Keyboarding data on electric and electronic equipment
 - A. Getting started
 - 1. Materials needed
 - 2. Basic operations
 - B. Keyboard layout
 - 1. Alpha/numeric keys
 - 2. Special features of the electric typewriter
 - 3. Special features of the electronic typewriter
- IV. Entering data into the microcomputer
 - A. Getting started
 - 1. Materials neededs
 - 2. Basic operations

- B. Microcomputer keyboard
 - 1. Alpha/numeric keys
 - 2. Special keys
 - 3. Other special keys
 - 4. Function keys
 - 5. Special features

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
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9. Prepare additional instructional material
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3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

OSS/Keyboarding
Unit 1: Information Processing Concepts

Specific Teaching Suggestions

1. Most teachers will be faced with a mix of students who know keyboarding and students who do not. It is advantageous for students to learn keyboarding by touch; however, you should not spend too much time helping students who missed typewriting classes to progress to the skill level of the experienced students.
2. The curriculum takes into consideration the diversity of keyboarding equipment. It is suggested that you review the Unit Contents Outline and the Unit Overview to identify necessary changes based on the type of keyboarding equipment you have in your classroom.
3. Many very good software programs that teach keyboarding are available for a nominal cost if you have microcomputers in the classroom. Because of the time allotted for this unit, modification of keyboarding instructional materials may be necessary. Refer to the resource section for a listing of keyboarding materials.
4. Be prepared to modify instruction for advanced students. A few suggestions are:
 - a. Consider peer instruction as a teaching strategy, teaming the experienced with the unexperienced student.
 - b. The experienced students may be assigned more advanced activities or programs. For example, if available assign mouse.
 - c. Develop advanced keyboarding activities for the experienced students to perform.
 - d. Try to make keyboarding assignments without referring to the difficulty. Sometimes the more advanced students react negatively if they believe their assignments are "harder." Some of the unexperienced students may feel intimidated.
5. Prepare handout information on the special features of the electric typewriter, electronic typewriter, and the microcomputer.
6. Prepare a transparency on the special features of one or all of the keyboarding equipment.
7. Using the group presentation as a teaching strategy, divide the class into three groups:
 - a. Assign group one the electric typewriter.
 - b. Assign group two the electronic typewriter.
 - c. Assign group three the microcomputer.
 - d. Working in groups, the students are to prepare reports which will be presented orally to the class. Help groups get started with the reports by suggesting resources, outlining techniques, and oral presentations. You may want to develop a format for students to follow in preparing their reports.
 - e. Ask class members to take notes and/or write down questions or interesting comments to be discussed at the end of each report.
 - f. Be sure to follow through at the conclusion of the reports. Some suggestions are:

- (1) Discussion of main ideas
 - (2) Comparison and contrast of machines
 - (3) Advantages and disadvantages of each machine
 - (4) Discussion of what businesses would most likely use a particular kind of keyboarding equipment
8. Show a film in which manual typewriters are used in the office. Let students identify changes that have been made in modern offices.
 9. Compile a classroom library on keyboarding. Get students involved. Some companies may give you old editions. Mix with recent editions.
 10. Prepare a bulletin board showing copy of data from (a) manual typewriter, (b) electric typewriter, (c) electronic typewriter, and (d) microcomputer. Try to use the same data.
 11. Invite a keyboarding specialist to speak to the class. Suggested topics are:
 - a. Speed (You may want a demonstration.)
 - b. Applications (You may want a demonstration.)
 - c. Job opportunities (beginning and experienced)
 - d. Opportunities with different companies (examples: banking, insurance, airlines)
 - e. Keyboarding equipment
 12. Invite an office education cooperative student whose current training includes keyboarding to speak to the class. Be sure the speaker enjoys keyboarding and has a positive outlook on the cooperative program.
 13. Take the class on a tour of your school office. Steps for planning are:
 - a. Secure permission from proper administrator. Be prepared to justify the tour as a valid learning experience.
 - b. Prepare the students before taking the tour:
 - (1) Purpose
 - (2) What to look for
 - (3) What you expect them to know or to do upon return to class.
 - c. Closure (summation or reinforcement of tour)
 14. Demonstrate proper keyboarding techniques to the class.
 15. If equipment is available, video the class as they practice keyboarding and/or typewriting. Try to show each student individually. Review the video with the class. One suggestion is to video

periodically during skill building exercises. Ask those students who are having problems to review the video independently and analyze their keyboarding skills. Lead them to see the problem areas, if any.

RESOURCES

TEXT/WORKBOOKS

*100 MULTI-ETHNIC TIMED WRITINGS:
MAKING COURAGE COUNT*
Forkner Publishing Co.

*101 TYPEWRITING TIMED WRITINGS WITH
SELECTED DRILLS*
South-Western Publishing Co.

BASIC INFORMATION KEYBOARDING SKILLS
South-Western Publishing Co.

*BASIC KEYBOARDING AND TYPEWRITING
APPLICATIONS*
South-Western Publishing Co.

BASIC TYPEWRITING APPLICATIONS
South-Western Publishing Co.

GLENCOE KEYBOARDING
Glencoe Publishing Co.

*HOUGHTON MIFFLIN KEYBOARDING AND
APPLICATIONS*
Houghton Mifflin, Co.

KEYBOARDING FOR EVERYONE
Anaheim Book Co.

*KEYBOARDING FOR INFORMATION
PROCESSING*
Gregg Division/McGraw-Hill, Inc.

*KEYBOARDING FOR THE INFORMATION
PROCESSOR*
Glencoe Publishing Co.

KEYBOARDING SKILLBUILDER
Glencoe Publishing

*PROFESSIONAL AND PERSONAL KEYBOARD-
ING AND TYPEWRITING*
South-Western Publishing Co.

TRIPLE-CONTROLLED TIMED WRITINGS
South-Western Publishing Co.

TYPE RIGHT!
Glencoe Publishing

TYPEWRITING SPEED/CONTROL BUILDERS
South-Western Publishing Co.

SOFTWARE

ALPHABETIC KEYBOARDING
Apple II, IIe, Franklin, 2 diskettes
IBM PC/XT
South-Western Publishing Co.

BUSINESS QUIZ: TYPING
Apple II, IIe, IIc 32k
Career Aids

EXECUTIVE SPELLER
Apple II, IIe, IIc 48k; IBM PC 64k
Glenco Publishing

*GREGG KEYBOARDING FOR INFORMATION
PROCESSING*
Apple II, 3 diskettes
Gregg Division/McGraw-Hill and Control Data
Corp.

*GREGG TYPING, SERIES EIGHT, TIMED
WRITINGS*
IBM PC/XT
Gregg Division/McGraw-Hill and Control Data
Corp.

*HOUGHTON MIFFLIN TYPEWRITING DRILL
AND PRACTICE SOFTWARE*
Apple IIc, IIe; IBM PC, XT, Tandy 1000
Houghton Mifflin Co.

*HOUGHTON MIFFLIN TYPEWRITING TIMED
WRITING SOFTWARE*
Apple IIc, IIe; IBM PC, XT, Tandy 1000
Houghton Mifflin Co.

HOW FAST CAN YOU TYPE RIGHT?
Barron Enterprises
Learning Services

KEYBOARD MASTER
Apple II, IIe
Encyclopedia Britannica Educational Corp.
Software Center

OSS/Keyboarding

Unit 1: Information Processing Concepts

KEYBOARDING FOR THE INFORMATION PROCESSOR

Apple IIc, IIe, II + ; IBM PC
Glencoe Publishing Co.

KEYBOARDING FOR THE PHYSICALLY HANDICAPPED

Apple II + , IIe or IIc; TRS-80 Model III, IV; IBM PC, PC jr.
Gregg Division/McGraw-Hill Book Co.

KEYSTROKES: KEYBOARDING FOR INFORMATION ENTRY

Apple II + , IIe or IIc; TRS-80 Model III or IV; IBM PC
Houghton Mifflin Co.

KEYWORDS

Apple II, IIe, IIc 48k
Career Aids

MASTER TYPE

Apple, Commodore 64, IBM PC
Scholastic Produced Software & Books

MASTERTYPE

Apple II, IIe, IIc 48k; Macintosh, Macintosh + ; IBM PC; XT, AT, 128k
Career Aids

MICROCOMPUTER KEYBOARDING

Apple II, IIe, Franklin; IBM PC; 4 diskettes
South-Western Publishing Co.

MICROTYPE I: WORD PROCESSING PICTURE PROJECTS

J. Weston Walch, Publisher

MICROTYPE II: CHALLENGING WORD

J. Weston Walch, Publisher

MICROTYPE TUTOR

J. Weston Walch, Publisher

PACING SOFTWARE FOR PROGRESSIVE TYPEWRITING SPEED PRACTICE

IBM PC/XT
Gregg Division/McGraw-Hill

SMARTTYPE-A KEYBOARDING PROGRAM

Apple, IBM
Gregg Division of McGraw-Hill

SUPERKEY

Apple II, IIe, IIc
Career Aids

TARGET TYPE

Apple II, IIe, IIc 48c
Career Aids

TNT; TYPING FOR NEW TYPISTS

Apple II, IIe, IIc 48k; IBM PC 64k
Glenco Publishing Co.

TYPE!

Apple, IBM
Scholastic Produced Software and Books

TYPE RIGHT

Career Aids

TYPE RIGHT

Career Publishing, Inc.

TYPE RIGHT, Advanced

Career Publishing, Inc.

TYPE RIGHT, Business Version

Career Publishing, Inc.

TYPE-A-THON

Aquarius People Materials, Inc.

TYPERRIGHT

Apple II, IIe, IIc 48k; IBM PC; XT, AT, 128k
Learning Services

TYPING INSTRUCTOR

IBM PC; 64k
Career Aids

TYPING STRATEGY

Apple II, IIe, IIc 48k
IBM PC, 64k
Career Aids

TYPING TUTOR IV

Apple, Commodore 64, IBM PC, XT, AT
Learning Services

MEDIA

DOS/IBM PC

Video
RMI Media Productions, Inc.

OSS/Keyboarding
Unit 1: Information Processing Concepts

HELLO PC

Video
RMI Media Productions, Inc.

***INTRODUCING COMPUTERS--LEARNING
THE LINGO***

Video
RMI Media Productions

INTRODUCTION TO MACINTOSH

Video
RMI Media Productions, Inc.

LEARNING DOS

Videos
Career Publishing, Inc.

LEARNING DOS, Level II

Videos
Career Publishing, Inc.

USING YOUR APPLE IIe

Video
RMI Media Productions, Inc.

USING YOUR IBM-PC

Video
RMI Media Productions, Inc.

SUGGESTED UNIT LESSON PLAN

SECTION II: KEYBOARDING

UNIT II: PROOFREADING AND CORRECTING ERRORS

ESSENTIAL ELEMENT:	75.87 (i) (1) (B)	ALLOCATED TIME:	10/20 Hours
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UNIT

OBJECTIVE: The instruction provided in this unit will assist students in applying appropriate procedures for proofreading and correcting errors.

STUDENT

COMPETENCIES: After completing this unit, the students should be able to:

1. Relate the importance of correct written material to the business sector.
2. List the characteristics of a good proofreader.
3. Identify common types of errors.
4. Explain common proofreading marks.
5. Demonstrate the ability to recognize common errors.
6. Demonstrate the ability to use common proofreading marks correctly.

FOCUS: Good proofreading skills are a high priority in achieving success in a business environment regardless of the position one has. Mistakes are costly. A good proofreader contributes to the productivity of business and thus enhances his/her own personal success.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Defining proofreading and the qualities of a good editor
 - A. Defining proofreading
 - B. Qualities of a good editor
- II. Proofreading procedures
 - A. Proofreading and Editing
 - B. Proofreading methods
 - 1. Paper bail method
 - 2. Angle method
 - 3. Reading aloud method
 - 4. Reading backward
 - 5. Cooperative method
 - C. Common types of errors
 - 1. Keyboarding errors
 - 2. English errors
 - 3. Formatting errors
 - 4. Appearance errors
 - 5. Author's writing errors
 - D. Proofreading for content
- III. Techniques of proofreading and editing
 - A. Using a guide when reading
 - B. Reading with another person
 - C. Using proofreader's marks
 - D. Proofreading and editing hints

- IV. Tools for the proofreader/editor
 - A. Types of resources and references required
 - B. Using a spelling checker
 - C. A variety of grammar checkers are also available

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Provide students with the proofreading symbols handout. These symbols are fairly standard, however, modify the symbols, and add other symbols according to what is used by businesses in your area.
2. Insist that students use the appropriate proofreading marks when editing their papers, or others.
3. Demonstrate the various techniques of proofreading. Have students practice the various techniques.
4. Set up a schedule (that begins after the unit is completed) for students to take turns serving as editor for the week. Each student will edit one set of papers during his/her week. You need to spot-check the edit and provide an editing grade for the student.
5. Remind students that when proofreading, it is important to verify the information contained in the copy with any related documents or reference materials and with the author. Be sure to check for items such as dates, times, amounts, addresses, and names.
6. Stress the importance of proofreading to the students.
7. Develop a rigid grading system for proofreading.
8. Prepare a bulletin board using student papers that students have corrected with proofreading marks and the corresponding final copies. Make a border using 3" x 5" cards with the proofreading symbols on them.
9. Have a guest speaker discuss the importance of editing and proofreading. Someone in the legal profession would be a good choice since the students can see the obvious relationship between uncorrected errors and the legal problems that may result from those errors.
10. Have students read about proofreading typewritten copy, and typing from handwritten or rough draft copy from one or more references.
11. Have students explain what proofreader's marks mean and how to use them. Review proofreader's marks carefully with students.
12. Give students several typewritten documents and business forms. Have them proofread each document and form for typographical errors, spelling, alignment, totals, etc. Have students edit the texts by using the appropriate proofreader's marks.

RESOURCES

TEXTBOOKS

DEVELOPING PROOFREADING SKILL
Gregg Division/McGraw-Hill

SRA REFERENCE MANUAL FOR OFFICE PERSONNEL
Science Research Associates, Inc.

APPLIED SECRETARIAL PROCEDURES
Gregg Division/McGraw-Hill

OFFICE PROCEDURES
MPC Educational Publishers

OFFICE PROCEDURES AND THE PROFESSIONAL SECRETARY
Science Research Associates, Inc.

THE OFFICE
South-Western Publishing Co.

THE REFERENCE GUIDE SECRETARIAL PROCEDURES AND ADMINISTRATION
South-Western Publishing Co.

THE WP BOOK, A REFERENCE MANUAL
John Wiley and Sons, Inc.

TEXT/WORKBOOKS

DEVELOPING EDITING SKILL
Gregg Division/McGraw-Hill

DEVELOPING PROOFREADING SKILL
Gregg Division/McGraw-Hill

EDITED COPY FOR WORD PROCESSING
Dictation Disk Co.

ENGLISH STYLE SKILL-BUILDERS
Gregg Division/McGraw-Hill

PROOFREADING
Glenco Publishing Co.

PROOFREADING PRECISION
South-Western Publishing Co.

TECHNIQUES FOR PROOFREADING AND MAKING CORRECTIONS
MPC Educational Publishers

TYPING FROM ROUGH DRAFTS
MPC Educational Publishers

MEDIA

DEVELOPING AND IMPROVING WRITTEN COMMUNICATION: GRAMMAR, ABBREVIATIONS, AND CAPITALIZATION
Slide tape package, competency test, and guide
Occupational Curriculum Lab
East Texas State University

DEVELOPING AND IMPROVING WRITTEN COMMUNICATION: PUNCTUATION, NUMBERS, WRITING SENTENCES AND PARAGRAPHS
Slide tape package, competency test, and guide
Occupational Curriculum Lab
East Texas State University

RECOGNIZING PROOFREADERS' MARKS AND USING THEM IN EDITING
Slide tape package and Competency Test
Occupational Curriculum Lab
East Texas State University

REVISING AND PROOFREADING
RMI Media Productions, Inc.

SPELLING FOR THE OFFICE
Slide tape package and Competency Test
Occupational Curriculum Lab
East Texas State University

SUGGESTED UNIT LESSON PLAN

SECTION II: KEYBOARDING

UNIT III: KEYBOARDING APPLICATIONS

ESSENTIAL ELEMENT:	75.87 (i) (1) (A)	ALLOCATED TIME:	13/20 Hours
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**UNIT
OBJECTIVE:** Students should be able to demonstrate the skill of keyboarding letters, memorandums, forms, and reports.

**STUDENT
COMPETENCIES:** After completing this unit, the student should be able to:

1. Use formatting and information processing terminology.
2. Correctly key letters, memorandums, forms, and reports.
3. Correctly format letters, memorandums, forms, and reports.
4. Classify common documents by type.
5. Produce documents to include the following format changes: line spacing, line alignment, type styles, margin adjustments, headers, and footers.

FOCUS: Almost every business job requires at least some writing and many jobs entail little else. Keyboarding has become one of the most common methods for information input; and letters, memorandums, forms and reports are four of the most common kinds of business communication. The individual who acquires the skills for inputting and formatting business documents should be able to enter and to successfully progress in the business environment.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Types of documents
 - A. Business letters
 - B. Memorandums
 - C. Forms
 - D. Business reports
- II. Formatting
 - A. Defined
 - B. Standard formats
- III. Formatting business letters
 - A. Parts of a business letter
 - B. Letter styles
 - C. Punctuation styles
 - D. Other letter formats
 - E. Flexibility of format
 - F. Format for envelopes
- IV. Formatting business documents
 - A. Memorandums
 - B. Forms
 - C. Business reports
 - D. Minutes
 - E. Tables
- V. Requirements of mailable business documents
 - A. Neatly and accurately typed
 - B. Correct spelling
 - C. Correct punctuation
 - D. Correct capitalization
 - E. Acceptable word division
 - F. Attractive placement

- VI. Information processing
 - A. Uses for information processing
 - B. Basic features
- VII. Document cycle
 - A. Input
 - B. Processing
 - C. Output
 - D. Distribution or communication of information

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Evaluate students in your class to find out their backgrounds and experience in keyboarding documents. Individualize this unit according to student's needs. This may mean having three groups working at the same time:
 - one group with very little keyboarding experience, and little to no document work,
 - one group with limited document experience, and
 - one group with experience in document production.
2. Develop a wallchart or handouts of the commands and options for the software.
3. Assemble samples of different categories of documents that might have been produced by a typewriter, electronic typewriter, or microcomputer. These can be displayed in the classroom.
4. Duplicate worksheets on types of documents and word processing features.
5. Prepare transparencies to use with lecture and discussion, outlining the document production procedures that will be used.
6. For each activity, review the appropriate instructions specific to your typewriter, electronic typewriter, microcomputer, and/or word processing software requirements.
7. Make available a hands-on tutorial for individual instruction in the use of the software.
8. Ask students to share with the class the various examples of word processing documents they have collected.
9. Arrange a competition among individuals or teams to produce assigned documents correctly in the shortest time.
10. Produce transparencies illustrating the features of the software to be used. Have the students make a list of these features.
11. Arrange a visit to a school office or local business where students can observe the "life" of a document, from input to storage and retrieval.
12. Discuss the function keys that are specific to your word processing software program. Make sure the students take notes.
13. Use a flow chart to illustrate the path of a document as it proceeds through the processing cycle.
14. Assign students to read about typing correspondence, completing pre-printed forms, and typing reports from one or more references.
15. Have students prepare a notebook in which they report on various correspondence formats/styles, placement guides, parts of a letter, etc.
16. Ask students to add to the notebook various types of business forms along with their purposes, and any notes that might assist them when typing pre-printed forms.

17. Have students include in their notebooks information regarding the difference between informal and formal reports; formats for typing reports; the parts of a formal report and their placement and purpose within the report; and the margins for unbound, sidebound, and topbound formal reports.
18. Give several sample business letters typed in various styles. For each letter have students:
 - (1) Identify the style used in typing the letter (block, modified block, or AMS simplified);
 - (2) Identify the type of punctuation used (open or mixed);
 - (3) Write the name of each part of the letter beside the corresponding part (for example, salutation and dateline).
19. Give a series of five-minute timed writings. Have students continue typing practice exercises until they reach required proficiency level.
20. Give samples of previously typewritten correspondence. Write a list of names and addresses, and the necessary supplies and equipment. Have students type each piece of correspondence from the appropriate sample copy, inserting a new name and address. The correspondence must be typed in the specified style/format--identical to the sample copy, free from all errors, and with all corrections undetectable.
21. Have students exchange documents. Have them proof these documents and return document for any verification of errors, and retype document.
22. Give copy to be typed, instructions, and the necessary supplies and equipment. Have students type each piece of correspondence so that the text is in the specified style; there are no spelling, grammatical, punctuation, or typographical errors; and all corrections are undetectable.
23. Disseminate to class various sample forms that are used in business organizations. Discuss, as a class, the purpose and type of information included on each form, and the situations requiring the use of these forms.
24. Distribute pre-printed forms, information to be typed on the forms, and the necessary equipment and supplies. Have students type the appropriate information on each form in the proper spaces; proofread the documents and correct all errors.
25. Distribute actual copies of reports prepared by different organizations. Have students study them, and identify the various formats/styles used, margins, parts contained with the reports, etc. Compare and contrast the reports, and determine which one(s) are more effective and/or pleasing in appearance.
26. Give samples of previously typewritten formal and informal reports containing errors and the necessary equipment and supplies. Have students proofread, mark errors, and retype each report correctly.
27. Give rough draft copies of formal and informal reports, accompanying information, instructions, and the necessary equipment and supplies. Type each report so that the text is in the specified style/format; all necessary information is included; the text is free of spelling, grammatical, punctuation, and typographical errors; and all corrections are undetectable.

RESOURCES

TEXT/WORKBOOKS

ADVANCED KEYBOARDING APPLICATIONS
Glenco Publishing

APPLEWORKS: INTEGRATED APPLICATIONS FOR MICROCOMPUTERS
text-workbook, diskettes
South-Western Publishing Co.

CENTERING TABLES AND FORMS
South-Western Publishing Co.

CENTURY 21 KEYBOARDING, FORMATTING, AND DOCUMENT PROCESSING
South-Western Publishing Co.

COMMUNICATION SKILLS FOR THE PROCESSING OF WORDS
South-Western Publishing Co.

COMMUNICATION SKILLS FOR WORD PROCESSING
Harcourt, Brace, and Jovanovich Publishing Co.

CONSULTAMATION, INC.: WORD PROCESSING PRACTICE AND APPLICATIONS
Gregg Division/McGraw-Hill

COPY PROCESSING
Glenco Publishing Co.

DEVELOPING CONCEPTS FOR WORD PROCESSING
Gregg Division/McGraw-Hill

THE ELECTRONIC OFFICE AND YOU: WORD PROCESSING CONCEPTS
Gregg Division/McGraw-Hill

GLENCO WORD PROCESSING: A PRACTICAL GUIDE TO CONCEPTS AND APPLICATIONS
Glenco Publishing Co.

INTEGRATED KEYBOARDING/COMMUNICATION SKILLS
South-Western Publishing Co.

INTRODUCTION TO WORD PROCESSING
South-Western Publishing Co.

INTRODUCTION TO WORD PROCESSING
Bobbs-Merrill Educational Publishers

LETTERS AND MEMOS
South-Western Publishing Co.

MANAGEMENT OF WORD PROCESSING OPERATION
The Benjamin/Cummings Publishing Co., Inc.

THE OFFICE
South-Western Publishing Co.

OFFICE PROCEDURES AND TECHNOLOGY
Milady Publishing Co.

101 WORD PROCESSING EXERCISES
Gregg Division/McGraw-Hill

REPORTS, MINUTES, AND SCHEDULES
South-Western Publishing Co.

SKILL BUILDING EXERCISES FOR THE WORD PROCESSOR
Dictation Disk Co.

WORD PROCESSING
Milliken Publishing Co.

WORD PROCESSING, A COMPREHENSIVE TRAINING PROGRAM
ESP, Inc. Productions

WORD PROCESSING APPLICATION FOR ELECTRONIC TYPEWRITERS
Houghton Mifflin

WORD PROCESSING CONCEPTS
South-Western Publishing Co.

WORD PERFECT
Careers

OSS/Keyboarding Techniques
Unit 3: Keyboarding Applications

MAGAZINES

ADMINISTRATIVE MANAGEMENT

MODERN OFFICE PROCEDURES

THE OFFICE

THE SECRETARY

WORD PROCESSING WORLD

WORDS

MEDIA

BASIC SKILLS FOR WORD PROCESSING
South-Western Publishing Co.

*BASIC SKILLS IN WORD PROCESSING THE
UNIVERSAL APPROACH*
filmstrips, guides and manual
South-Western Publishing Co.

FORMATTING BUSINESS REPORTS
slide tape, activities
Occupational Curriculum Lab
East Texas State University

GENERATING DOCUMENTS
2 filmstrips, cassettes, guide
Prentice-Hall Media

AN INTRODUCTION TO WORD PROCESSING
3 filmstrips, cassettes, guide
Prentice-Hall Media

KEYBOARDING AND EDITING
4 filmstrips, cassettes, guide
Prentice-Hall Media

*PREPARING AND DISTRIBUTING NOTICES
FOR MEETINGS*

Slide tape, activities
Occupational Curriculum Lab
East Texas State University

*WORD PROCESSING AND CHANGING OF-
FICE ENVIRONMENT*

student activities, projects, filmstrips
South-Western Publishing Co.

WORD PROCESSING IN ACTION

Sound filmstrips
Glenco Publishing Co.

SIMULATIONS

*THE CORRESPONDENCE SECRETARY-
SIMULATION PROJECT*
Milady Publishing

*GENERAL OFFICE ASSISTANT SIMULATION-
SUNCOAST CIVIC CENTER*
South-Western Publishing Co.

*MERCURY SYSTEMS, INC.: PRACTICE SET IN
WORD/INFORMATION PROCESSING*
Gregg Division/McGraw-Hill

*SUN ISLAND HOTEL-A WORD PROCESSING
SIMULATION*
Harcourt, Brace, and Jovanovich Publishing Co.

*TRIANGLE BROADCASTING CO.:
A WORD/INFORMATION PROCESSING
SIMULATION*
Bobbs-Merrill Educational Publishers

*WORD PROCESSING SKILLS AND SIMULA-
TIONS*

*THE WORD PROCESSING SPECIALIST, INFO-
TEC-OFFICE JOB SIMULATION*
South-Western Publishing Co.

SECTION III
EMPLOYMENT

ESSENTIAL ELEMENTS

75.87 (i)(7)(A)(B)

7. Concepts and skills necessary for securing and maintaining employment.

The student shall be provided opportunities to:

- (A) demonstrate the skills necessary for job application and interview; and
- (B) apply human relations skills and the ability to work with others.

SECTION III: EMPLOYMENT

UNIT I: SECURING EMPLOYMENT

ESSENTIAL	75.87	ALLOCATED	
ELEMENT:	(i)(7)(A)(B)	TIME:	2/5 hours

An instructional unit for "Securing Employment" has been developed as part of a series of instructional units for teaching the Common Essential Elements for Office Education.

You may secure the unit, "Successful Employment for Office Education," through the Occupational Curriculum Laboratory, Mayo Hall, East Texas Station, East Texas State University, Commerce, TX 75428.

Telephone: (214) 886-5624.

The title and order number are:

SUCCESSFUL EMPLOYMENT FOR OFFICE EDUCATION

BO-310-CE2

SECTION III: EMPLOYMENT

UNIT II: MAINTAINING EMPLOYMENT

ESSENTIAL	75.87	ALLOCATED	
ELEMENT:	(i)(7)(A)(B)	TIME:	2/5 hours

An instructional unit for "Maintaining Employment" has been developed as part of a series of instructional units for teaching the Common Essential Elements for Office Education.

You may secure the unit, "Successful Employment for Office Education," through the Occupational Curriculum Laboratory, Mayo Hall, East Texas Station, East Texas State University, Commerce, TX 75428.

Telephone: (214) 886-5624.

The title and order number are:

SUCCESSFUL EMPLOYMENT FOR OFFICE EDUCATION

BO-310-CE2

SECTION III: EMPLOYMENT

UNIT III: HUMAN RELATIONS SKILLS

ESSENTIAL	75.87	ALLOCATED	
ELEMENT:	(i)(7)(B)	TIME:	4/10 hours

An instructional unit for "Human Relations Skills" has been developed as part of a series of instructional units for teaching the Common Essential Elements for Office Education.

You may secure the unit, "Human Relations for Office Education," through the Occupational Curriculum Laboratory, Mayo Hall, East Texas Station, East Texas State University, Commerce, TX 75428.

Telephone: (214) 886-5624.

The title and order number are:

HUMAN RELATIONS FOR OFFICE EDUCATION

BO-310-CE5

SECTION IV:

FILING

ESSENTIAL ELEMENT

75.87(i)(2) (A) (B)

2. Concepts and skills necessary for filing.

The student shall be provided opportunities to:

- (A) demonstrate procedures used in alphabetic, numeric, subject, and geographic filing; and
- (B) identify procedures used in electronic filing.

SUGGESTED UNIT LESSON PLAN

SECTION IV: FILING

UNIT I: ALPHABETICAL FILING

ESSENTIAL ELEMENT:	75.87 (i) (2) (A)	ALLOCATED TIME:	5/15 Hours
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**UNIT
OBJECTIVE:** Students should be able to demonstrate the concepts and skills necessary for alphabetical filing.

**STUDENT
COMPETENCIES:** After completing this unit, the student should be able to:

1. Recognize the purposes for keeping business records.
2. Use concepts relative to records management.
3. Identify the causes for misfiling records.
4. Demonstrate methods for filing alphabetically.

FOCUS: Business records are a vital part of an organization. These records consist of information or data which has to be stored. Once stored, the records must be easily accessible when needed. Several systems are used in business to store this information. One of the common methods for storing information uses the alphabetic system and is commonly referred to as alphabetical filing. The office worker needs to be familiar with the procedures for using an alphabetical filing system.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Introduction to records management
 - A. Defining records management
 - 1. Information
 - 2. Records management
 - 3. Filing
 - 4. Record
 - 5. Record cycle
 - B. Goals of records management
- II. Steps in filing correspondence
 - A. Inspect for a release mark
 - B. Index correspondence
 - C. Coding correspondence
 - D. Cross-referencing procedures
 - E. Sorting
 - F. Storing correspondence
 - G. Purpose of the filing system
- III. Alphabetical filing
 - A. Types of filing methods
 - B. Alphabetic filing
 - 1. Definition
 - 2. Sources
 - 3. Straight alphabetical
- IV. Misfiling
 - A. Causes of misfiling
 - 1. Carelessness

- 2. Improper use of filing equipment and/or supplies
 - 3. Improper coding
 - B. Ways of preventing the losses of records
 - C. Systematic method for locating misfiled records
 - D. What to do if the file cannot be located
- V. Filing supplies and equipment
 - A. Basic principles of use
 - B. Supplies
 - C. Equipment
- VI. Transfer of records
 - A. Active and inactive records
 - B. Classification of records
 - C. Record retention policy
 - D. File transfer steps
 - E. Methods of transfer
- VII. Retrieval of information from files
 - A. Primary purposes of using a file system
 - B. Types of retrieval systems
 - 1. Direct-access
 - 2. Indirect-access

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Use Roman numeral sections I and II of the overview as introductory lessons for the alphabetical filing unit. They provide instruction on the basic filing procedures.
2. Use rules based on the ARMA simplified Filing Standard Rules. They are easy to teach and to learn.
3. Present the rules using transparencies and/or chalkboard illustrations.
4. Discuss the reasons for each rule.
5. Illustrate the rules by using actual names from the class and the community to personalize the situation.
6. Use the local telephone directory as a source of both personal and business names.
7. Contact local businesses and vendors for illustrations of filing systems and equipment.
8. A practice set or a textbook that has alphabetical filing included should be used for student practice materials. Practice sets are very important and effective. Make sure there is adequate practice for the information control cycle of filing, charge-out, and follow-up included in the practice set or other simulated projects.
9. Remind the students that the business they work for may use other rules. However, consistency of use is the most important concept. It would be nice to convert an older arrangement to a new one; however, it may be too costly for some organizations to do immediately. Suggest to your students that instead of converting the older files, that they convert any new files to the new alphabetic filing rules. The rules that businesses use should actually be documented by the organization. This may be in the form of a list of alphabetic filing rules found in a handbook or records management book.
10. If you have students that are working, ask them to secure a list of the rules used in their office.
11. Use discussion to stress the place of filing in a total records management program.
12. Prepare bulletin boards that relate to the information areas covered:
 - (1) Filing supplies
 - (2) Filing techniques
13. Make sure that the students are aware of the problems of misfiling covered in section IV of the overview. Hold a discussion concerning the importance of accurate filing.
14. Emphasize the importance of proper information.
15. Visit a company's file department. Have the person in charge of records management explain the operations used and any special procedures that they follow.
16. The terminology list is comprehensive. You may need to revise it to include only the terms which are more relative to your course.

RESOURCES

TEXT/WORKBOOKS

ALPHABETIC INDEXING
South-Western Publish Co.

ALPHABETIC INDEXING
15-20 class hours, text, workbook
South-Western Publishing Co.

APPLIED SECRETARIAL PROCEDURES
Gregg Division/McGraw-Hill Book Co.

ARMA FILING RULES
Twin Oaks Publishing, Inc.

BUSINESS COMPUTER SYSTEMS
Mitchell Publishing, Inc.

BUSINESS FILING AND RECORDS CONTROL
South-Western Publishing Co.

BUSINESS RECORDS CONTROL
South-Western Publishing Co.

FILING MADE EASY
Houghton Mifflin

FILING PROCEDURE
MPC Educational Publishers
(Milady Publishing Co.)

GENERAL OFFICE PROCEDURES
South-Western Publishing Co.

INTENSIVE OFFICE SKILLS REVIEW
South-Western Publishing Co.

OFFICE FILING PROCEDURES
South-Western Publishing Co.

OFFICE PROCEDURES
Gregg Division/McGraw-Hill Book Co.

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin

PROGRESSIVE FILING
Gregg Division/McGraw-Hill Book Co.

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co

PRACTICE SETS/MEDIA

ALPHABETIC FILING PROCEDURES
South-Western Publishing Co.

ALPHABETIC INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES
Audiovisual package
Occupational Curriculum Laboratory
East Texas State University

ALPHABETIC INDEXING RULES
Forsegan

EDL FILING COURSE FILMSTRIPS
Gregg Division/McGraw-Hill Book Co.

FILING MADE EASY, A FILING SIMULATION
Houghton Mifflin

FILING PRACTICE WORKBOOK
Glenn Publishing Co.

FILING PROCEDURES
MPC Educational Publishers
(Milady Publishing Co.)

FILING SKILLS
Film, program guide, masters
Prentice Hall Publishing Co.

GREGG QUICK FILING TRANSPARENCIES
Gregg Division/McGraw-Hill Book Co.

GREGG QUICK FILING PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

OJT FILE CLERK
South-Western Publishing Co.

PROGRESSIVE FILING
Gregg Division/McGraw-Hill Book Co.

WORKBOOK EXERCISES IN ALPHABETIC FILING
Gregg Division/McGraw-Hill Book Co.

OSS/Filing
Unit 1: Alphabetical Filing

SOFTWARE

ALPHABETIC INDEXING RULES

Career Aids, Inc.
1 disk, workbook, and teacher's manual
Apple II, IIe, or IIc
TRS-80 Model III or IV
IBM-PC

ALPHABETIC INDEXING RULES APPLICATION BY COMPUTER

South-Western Publishing Co.
Text, workbook diskette for:
TRS-80 Model III and IV
TRS-80 network III and IV
Apple II Plus and Apple IIc
IBM-PC
Tandy 1000

APPLEWORKS

Apple Computer

DATA HANDLER

MECC Publications

DBASE II

Ashton-Tate

FILE CLERK

Career Aids
Micro-computer Job Simulator Series
Apple 48k

INFOR STAR

MicroPro International Corp.

LIST HANDLER

Silicon Valley Systems

LOTUS 1-2-3

Lotus Development Corp.

PFS FILE

Software Publishing Corp.

QUICK-FILE

Apple Computer

MEDIA

FILING: KNOW WHERE IT GOES

Career Aids
Filmstrip/Video from filmstrip
OSS/Filing

SUGGESTED UNIT LESSON PLAN

SECTION IV: FILING

UNIT II: NUMERICAL FILING

ESSENTIAL ELEMENT:	75.87 (i)(2)(A)	ALLOCATED TIME:	3/6 Hours
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**UNIT
OBJECTIVE:** Students should be able to demonstrate the concepts and skills necessary for numerical filing.

**STUDENT
COMPETENCIES:** After completing this unit, the student should be able to:

1. Demonstrate the procedures for filing numerically.

FOCUS: Business records are a vital part of an organization. These records, consisting of information and data, must be kept, stored, and easily retrieved for successful operations of the business. Several systems are used for keeping records. This unit will assist the student in understanding the concepts involved in keeping records using the numerical system.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Characteristics of numerical filing
 - A. Numerals
 - B. Parts of numerical filing system
 - C. Indirect access system
- II. Types of numerical systems
 - A. Straight
 - B. Terminal digits
 - C. Middle digits
 - D. Subject-numeric
 - E. Alphanumeric
 - F. Phonetic
 - G. Chronological
- III. Advantages of numerical filing system

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Use Roman numeral sections I and II of the overview for the alphabetical filing unit as introductory lessons. They provide instruction on the basic filing procedures.
2. Use rules based on the ARMA simplified Filing Standard Rules. They are easy to teach and to learn.
3. Present the rules using transparencies and/or chalkboard illustration.
4. Discuss the reasons for each rule.
5. Contact local businesses and vendors for illustrations of filing systems and equipment.
6. A practice set or a text book that has numerical filing included should be used for student practice materials. Practice sets are very important and effective. Make sure there is adequate practice for the information control cycle of filing, charge-out and follow-up included in the practice set or other simulated projects.
7. Remind the students that the business they work for may use other rules. However, consistency of use is the most important concept. It would be nice to convert an older arrangement to a new one; however, it may be too costly for some organizations to do immediately. Suggest to your students that instead of converting the older files, that they convert any new files to a different numerical system. The rules that businesses use should actually be documented by the organization. This may be in the form of a list of numerical filing rules found in a handbook or records management book.
8. If you have students that are working, ask them to secure a list of the rules used in their office.
9. Visit a company's file department. Have the person in charge of records management explain the operations used and any special procedures that they follow.
10. The terminology list is comprehensive. You may need to revise it to include only the terms which are more relative to your course.
11. Review the "Additional Student Activities" for alphabetical filing for additional ideas.

RESOURCES

Refer to the list of resources included in Unit 1: Alphabetical Filing.

SUGGESTED UNIT LESSON PLAN

SECTION IV: FILING

UNIT III: OTHER FILING SYSTEMS

ESSENTIAL ELEMENT:	75.87 (i)(2)(A)(B)	ALLOCATED TIME:	2/4 Hours
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**UNIT
OBJECTIVE:** Students will be able to identify concepts and skills necessary for filing.

**STUDENT
COMPETENCIES:** After completing this unit, the student should be able to:

1. Identify procedures used in subject filing.
2. Identify procedures used in geographic filing.
3. Identify procedures used in electronic filing.

FOCUS: Almost all organizations use more than one system for filing. The beginning office worker needs to be familiar with subject, geographic, and electronic filing systems. The use of computers in the business office has resulted in more rapid and efficient systems for filing. For this reason, this unit addresses electronic filing in detail.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Subject filing
 - A. Arrangement
 - B. Dictionary and encyclopedia systems
 - C. Personnel requirements
 - D. Use of alphabetical index listing
 - E. Uses
 - F. Organization of subject files
 - G. Indirect access system
- II. Geographic filing
 - A. Arrangements
 - B. Advantage
 - C. Uses
 - D. Methods of arranging records
- III. Electronic filing
 - A. Objectives
 - 1. Decreasing repetitive work
 - 2. Increasing accuracy
 - 3. Eliminating inaccuracy
 - 4. Increasing efficiency
 - B. Advantages and disadvantages of database management systems
 - C. Purposes of database
 - D. Three types of databases
 - E. Applications
 - F. Data logical models
 - G. Capabilities of databases
 - H. Creating a database
 - I. Comparison of database software

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

OSS/Filing
Unit 3: Other Filing Systems

Specific Teaching Suggestions

Review the "Specific Teaching Suggestions" included in Unit 1: Alphabetical Filing.

NOTE: This unit includes much more information than could be covered in the recommended time.
The purpose for this is to give teachers options as to what they want to include in this unit.

RESOURCES

TEXTBOOKS

ADVANCED DBASE III PLUS
Borland, Osborne, and MicroPro

APPLEWORKS TUTORIAL
Apple Computer Co.
Borland, Osborne, and MicroPro
McGraw-Hill Book Co.

THE ART OF USING COMPUTERS
Boyde and Fraser Publishing Co.

COMPUTER FUNDAMENTALS IN THE INFORMATION AGE
Anaheim Publishing Co.

DATABASE APPLICATIONS
South-Western Publishing Co.

DBASE III PLUS MADE EASY
Borland, Osborne, and MicroPro

DBASE III PLUS: THE COMPLETE REFERENCE
Borland, Osborne, and MicroPro

DBASE III: TIPS AND TRAPS
Borland, Osborne, and MicroPro

ELECTRONIC OFFICE PROCEDURES
Gregg Division/McGraw-Hill Book Co.

INFORMATION PROCESSING CONCEPTS, PRINCIPLES, AND PROCEDURES
South-Western Publishing Co.

INFOSTAR TUTORIAL
Craven Publishing Co.

INTEGRATED SOFTWARE PRINCIPLES AND APPLICATION USING LOTUS 1-2-3
Gregg Division/McGraw-Hill Book Co.

THE LOTUS GUIDE TO LEARNING 1-2-3
Addison Wesley Publishing

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin Co.

USING DBASE III PLUS
Borland, Osborne, and MicroPro

USING REFLEX: THE DATABASE MANAGER
Borland, Osborne, and MicroPro

PRACTICE SETS

APPLEWORKS-INTEGRATED APPLICATIONS FOR MICROCOMPUTERS
South-Western Publishing Co.

APPLICATIONS USING THE PERSONAL COMPUTER
South-Western Publishing Co.

COMPUTERIZED INVENTORY PROCEDURES
South-Western Publishing Co.

GIFTIQUE: AN INFORMATION MANAGEMENT WORKFLOW
South-Western Publishing Co.

MICROCOMPUTER SIMULATION IN BUSINESS
South-Western Publishing Co.

SNOWDRIFT ICE CREAM
Gregg Division/McGraw-Hill Book Co.

TRONICS, INC
South-Western Publishing Co.

WORD PROCESSING CONCEPTS AND APPLICATIONS
Gregg Division/McGraw-Hill Book Co.

SOFTWARE

APPLEWORKS
Apple Computer Co.

APPLICATIONS USING THE PC
South-Western Publishing Co.

COMPUTER APPLICATIONS: DATABASE
Educational Activities Inc.
Apple II, IIE, IIC 48k
IBM PC; XT, AT, 128k

OSS/Filing
Unit 3: Other Filing Systems

DATABASE APPLICATIONS
South-Western Publishing Co.

DATABASE MANAGEMENT SYSTEMS: AN INTRODUCTION
Educational Activities Inc.
Apple II, IIE, IIC 48k
IBM PC; XT, AT, 128k

DBASE III
Ashton-Tate
IBM PC; XT, AT, 256k

ELECTRIC DESK
Alpha Software

FILING ASSISTANT INSTRUCTIONAL MODULE
Pass Publications

FRAMEWORK II
Ashton-Tate Publishing

FRAMEWORK III
Wordware Publishing

IBM FILING ASSISTANT
IBM Personal Computer Division

INFOTAR
MicroPro International Corp.

INTRODUCTION TO DATABASE
Learning Arts
IBM PC; XT, AT, 128k

JAZZ
Lotus Development Corp.

LOTUS 1-2-3
Lotus Development Corporation

MICROSOFT WORKS
Microsoft

OPEN ACCESS
Software Products International

PFS: FILE AND REPORT
Software Publishing Corp.

Q&
Symantec
IBM PC; XT, AT, 512k

QUICK FILE II
Apple Computer Co.

REFLEX: THE ANALYST
Borland International
IBM PC; XT, AT, 128k
Macintosh, Macintosh +

REFLEX WORKSHOP
Borland International
IBM PC; XT, AT, 128k
Macintosh, Macintosh +

SORTING TECHNIQUES I
J. Weston Walch, Publisher
Apple II, IIE, IIC 48k

SORTING TECHNIQUES II
J. Weston Walch, Publisher
Apple II, IIE, IIC 48k

WRITING ASSISTANT
IBM Personal Computer Division

MEDIA

INTRODUCTION TO DBASE III PLUS
Career Publishing, Inc.

INTRODUCTION TO DBASE III PLUS, Level II
Career Publishing, Inc.

INTRODUCTION TO DBASE III PLUS, Level III
Career Publishing, Inc.

INTRODUCTION TO APPLEWORKS DATABASE
Career Publishing, Inc.

SECTION V

PROCESSING MAIL ESSENTIAL ELEMENTS

75.87(i)--4(A)(B)

4. Concepts and skills necessary for processing mail. The student shall be provided opportunities to:
 - (A) identify the procedures involved in processing incoming and outgoing mail; and
 - (B) identify the procedures involved in transmitting mail electronically.

SUGGESTED UNIT LESSON PLAN

SECTION V: PROCESSING MAIL

UNIT I: INCOMING AND OUTGOING MAIL

ESSENTIAL ELEMENTS:	75.87 (i) (4) (A)	ALLOCATED TIME	2-4 HOURS
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UNIT

OBJECTIVE: Students should be able to identify the classes of mail and to recognize the steps in processing incoming and outgoing mail.

**STUDENT
COMPETENCIES:**

After completing this unit, the student should be able to:

1. Identify traditional mail terminology.
2. List steps of handling incoming mail.
3. Describe methods of processing outgoing mail.
4. Classify the various types of mail.
5. Compare and contrast various postal services.

FOCUS: Understanding and applying the procedures and principles associated with efficient mail handling is one of the important operations within an organization.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Incoming mail
 - A. Steps in processing traditional mail
 - B. Processing other mail
 - C. Organizing mail
- II. Outgoing mail
 - A. Procedures for handling outgoing mail
 - B. Processing mail
- III. Classification of mail and types of postal services
 - A. Classifications of mail
 - B. Types of postal services

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Visit your local post office and have the students observe how the mail is sorted and handled. Prepare students for the visit by having them suggest questions to ask. Then, let them volunteer to ask the questions of their choice, or assign a specific question for each student to ask. A good time to go is right after Thanksgiving because the volume of mail is up.
2. Assemble all the supplies needed for processing mail. Demonstrate the steps involved in processing mail.
3. Have the students bring a variety of types of mail. Reseal the envelopes, and have students use them as a sorting project.
4. Use the Mail Procedures Module and the slide tape unit prepared by the Occupational Curriculum Lab at East Texas State University.

RESOURCES

Refer to the list of resources included in Unit 2: Electronic Mail.

SUGGESTED UNIT LESSON PLAN

SECTION V: PROCESSING MAIL

UNIT II: ELECTRONIC MAIL

ESSENTIAL ELEMENTS:	75.87 (i) (4) (B)	ALLOCATED TIME:	2-5 hours
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UNIT

OBJECTIVE: Students should be able to explain the procedures involved in transmitting mail electronically.

STUDENT

COMPETENCIES: After completing this unit, the student should be able to:

1. Identify electronic mail terminology.
2. Describe the characteristics of electronic mail.
3. Identify various types and services of bulletin boards.
4. Describe the characteristics and classifications of facsimile machines.

FOCUS: Transmitting mail electronically is being used more often in businesses. This unit will assist in developing skills and knowledge needed in processing mail efficiently through electronics.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Basics of electronic mail
 - A. Selecting types of E-mail
 - B. Advantages and disadvantages of using E-mail
 - C. Forms of electronic mail
- II. Bulletin boards and facsimile
 - A. Bulletin boards
 - B. Facsimile

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Have students write or call electronic mail services to inquire about their features, costs, and benefits.
2. Arrange for a systems operator from a local bulletin board service to visit the class to discuss access methods, costs, services, and any other special requirements. A member of a local computer group may also be able to assist.
3. Provide students with current computer magazines and/or arrange access to the school library for research.

RESOURCES

TEXT/WORKBOOKS

THE ADMINISTRATIVE SECRETARY
Gregg/McGraw-Hill

EXECUTIVE SECRETARIAL PROCEDURES
Gregg/McGraw-Hill

GENERAL OFFICE PROCEDURES
Gregg/McGraw-Hill

THE OFFICE
South-Western Publishing

OFFICE PROCEDURES
MPC Educational Publishers

OFFICE PROCEDURES FOR THE PROFESSIONAL SECRETARY SRA

MAGAZINES

ADMINISTRATIVE MANAGEMENT

MODERN OFFICE PROCEDURES

THE OFFICE

THE SECRETARY

MEDIA

MAIL PROCESSING: THE INS AND OUTS
Filmstrip
Career Aids, Inc.

HANDLING INCOMING AND OUTGOING MAIL
Slide/tape presentation
Occupational Curriculum Laboratory
East Texas State University

SECTION VI
BUSINESS OPERATIONS

ESSENTIAL ELEMENTS

75.87 (i)(6)(A)(B)

6. Concepts and skills necessary for effective understanding of business operations.

The student shall be provided opportunities to:

- (A) describe the role of business in the enterprise system; and
- (B) identify the general responsibilities of employees.

SECTION VI: BUSINESS OPERATIONS

UNIT I: ROLE OF BUSINESS IN FREE ENTERPRISE SYSTEM

ESSENTIAL 75.87
ELEMENT: (i)(6)(A)

ALLOCATED
TIME: 2/6 hours

An instructional unit for "Role of Business in Free Enterprise System" has been developed as part of a series of instructional units for teaching the Common Essential Elements for Office Education.

You may secure the unit, "Entrepreneurship for Office Education," through the Occupational Curriculum Laboratory, Mayo Hall, East Texas Station, East Texas State University, Commerce, TX 75428.

Telephone: (214) 886-5624.

The title and order number are:

ENTREPRENEURSHIP FOR OFFICE EDUCATION

BO-310-CE3

SECTION VI: BUSINESS OPERATIONS

UNIT II: RESPONSIBILITIES OF EMPLOYEES

ESSENTIAL	75.87	ALLOCATED	
ELEMENT:	(i)(6)(B)	TIME:	2/6 hours

An instructional unit for "Responsibilities of Employees" has been developed as part of a series of instructional units for teaching the Common Essential Elements for Office Education.

You may secure the unit, "Entrepreneurship for Office Education," through the Occupational Curriculum Laboratory, Mayo Hall, East Texas Station, East Texas State University, Commerce, TX 75428.

Telephone: (214) 886-5624.

The title and order number are:

ENTREPRENEURSHIP FOR OFFICE EDUCATION

BO-310-CE3

SECTION VII
FINANCIAL MANAGEMENT

ESSENTIAL ELEMENTS

75.87(i)(3)(A)(B)

3. Concepts and skills necessary for financial activities.

The student shall be provided opportunities to:

- (A) demonstrate the ability to maintain a checking account; and
- (B) demonstrate the procedures involved in preparing a payroll and payrolling tax reports.

SUGGESTED UNIT LESSON PLAN

SECTION VII: FINANCIAL MANAGEMENT

UNIT I: CHECKING ACCOUNT

ESSENTIAL ELEMENTS:	75.87 (i) (3) (A)	ALLOCATED TIME:	3/6 hours
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UNIT

OBJECTIVE:

Students will be provided opportunities to demonstrate the ability to maintain a checking account.

STUDENT

COMPETENCIES:

After completing this unit, the student should be able to:

1. Demonstrate the ability to use the touch system on the electronic calculator for computation of simple mathematical problems.
2. Describe facets of banking procedures relating to checking accounts.
3. Demonstrate the ability to:
 - a. Prepare a deposit slip.
 - b. Prepare checks.
 - c. Maintain a check register.
 - d. Reconcile a bank statement.

FOCUS:

Maintaining a checking account for personal and business management is an essential skill in understanding finances.

DOMAINS:

Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS:

Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Electronic calculator
 - A. Types of electronic calculators
 - B. Preparing to use calculators
 - C. Using the touch method
- II. Banking procedures
 - A. Making a deposit
 - B. Preparing checks
 - C. Reconciling a bank statement
 - D. Maintaining a canceled check file

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. If you are teaching ten key,
 - A. This unit may be completed using a ten-key pad on a computer or calculator. There are some software programs available for training in the ten-key operations, and for use with banking operations.
 - B. It is suggested that a software program or a ten-key calculator workbook be used for learning the ten-key pad adequately. Use the projects listed in this unit as a review before assigning the test.
 - C. Demonstrate the touch system on both the electronic calculator and the computer keypad. Encourage students to acquire the habit of holding the pencil in their hands properly.
 - D. Use the 5-minute practice timing to build the students' speed once they have learned all of the keys. Begin by giving this timing at least six times during the class period. Do this for three days. Then, use it as a sponge activity at the beginning of the period. Have the students take two timings, recording their results on the timing record sheet provided. Do this for about six weeks--periodically giving a timing that you observe closely and count as a grade. Some days have students strive for speed, other days, for accuracy. When grading, students should grade only their answers to the problems. Do not have them mark every mistake. Have the students record the grade as 75/2 on the timing sheet. If they are using a calculator, have them turn in their tapes. Do not give the students a grade until the end of the six week period; then, grade on their improvement.
 - E. Use the Microcomputer Business Applications, by MAVCC, that is available through the Occupational Curriculum Lab at East Texas State University. It is available for use with IBM, using the Deskmate software program, or for the Apple, using Appleworks program. Some of the activities relate to financial management.
2. Secure the audiovisual, Handling Financial Responsibilities, Occupational Curriculum Lab, East Texas State University.
3. Prepare transparencies and duplicate forms for banking activities.
4. Discuss the terms and definitions related to this unit. Add additional terms that you feel are necessary, or that are mentioned in discussion.
5. Gather samples of deposit slips, checks, canceled checks, check registers and stubs, and bank statements to facilitate discussion.
6. Demonstrate how to void a check.
7. Provide an example of a bank statement and canceled checks to aid in the discussion of balancing a checkbook.
8. Illustrate the types of endorsements and go over the new procedures for endorsements.
9. Use the overhead projector and transparencies to demonstrate the use of forms during discussion.

RESOURCES

TEXTBOOKS

THE ADMINISTRATIVE SECRETARY
Gregg Division/McGraw-Hill Book Co.

BANKING AND CREDIT OCCUPATIONS
Prentice-Hall Media

CENTURY 21 ACCOUNTING
South-Western Publishing Co.

CLERICAL PAYROLL PROCEDURES
South-Western Publishing Co.

DEVELOPING BOOKKEEPING SKILLS
AMSCO School Publications

GENERAL OFFICE PROCEDURES FOR COLLEGES
South-Western Publishing Co.

OFFICE MACHINES
Houghton-Mifflin Publishing Co.

OFFICE MACHINES COURSE
South-Western Publishing Co.

OFFICE PROCEDURES, 2nd ed.
MPC Educational Publishers

SECRETARIAL OFFICE PROCEDURES FOR COLLEGES
Gregg Division/McGraw-Hill Book Co.

SMALL BUSINESS MANAGEMENT
Delmar Publishers

PRACTICE SETS

ACTIVITIES HANDBOOK FOR TEACHING WITH THE HAND-HELD CALCULATOR
Allyn and Bacon

BANK RECONCILIATION PROJECTS
Glencoe Publishing Co.

CAPITOL AUDITING SERVICE: A CALCULATOR SIMULATION
Houghton-Mifflin Publishing Co.

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE

Audiovisual package
Occupational Curriculum Laboratory
East Texas State University

RPM UNLIMITED: A BUSINESS MACHINES PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

SECURITY FIRST-BANK-A BANKING CUSTOMER SIMULATION
South-Western Publishing Co.

STANDARD PAYROLL PROJECT
Glencoe Publishing

SOFTWARE

BANKING-MICROCOMPUTER JOB SIMULATOR SERIES
1 disk, student manual and documents needed
Apple II or IIe
TRS-80 Model III

MICROCOMPUTER KEYPAD OPERATIONS
1 disk and documentation for: Apple, TRS-80 Model III or IV, IBM-PC
Career Aids, Inc.

DATA ENTRY SIMULATION
Career Publishing, Inc.

MEDIA

CHECK WRITING PROGRAM
Videos
Career Aids

A GUIDE TO CHECKING AND SAVINGS ACCOUNTS
Filmstrips with Cassettes
Career Aids

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE
Audiovisual Package
Educational Development and Training Center

OSS/Financial Management
Unit 1: Checking Account

THE PAYCHECK PUZZLE

Videos

Career Aids

SUGGESTED UNIT LESSON PLAN

SECTION VII: FINANCIAL MANAGEMENT

UNIT II: PAYROLL AND TAX REPORTING

ESSENTIAL

ELEMENTS: 75.87(i)(3)(B)

ALLOCATED TIME: 3/6 Hours

UNIT

OBJECTIVE:

Students shall be provided opportunities to demonstrate the procedures involved in preparing payroll and tax reports.

STUDENT

COMPETENCIES:

After completing this unit, the student should be able to:

1. Demonstrate procedures involved in preparing a payroll.
2. Demonstrate procedures involved in preparing tax reports.

FOCUS:

Businesses expect their employees to be familiar with payroll and tax procedures. To know these procedures will assist a person in the management of his/her personal finances.

DOMAINS:

Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS:

Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Payroll procedures
 - A. General payroll information
 - 1. Categories of employees
 - a. Salaried
 - b. Hourly
 - 2. Payroll deductions
 - a. Involuntary deductions
 - (1) Federal Insurance Compensation Act (FICA)
 - (2) Federal Income Tax
 - (3) State and/or local taxes
 - b. Voluntary deductions
 - 3. Preparing payroll
 - a. Manual system
 - b. Computer system
 - B. Payroll forms
 - 1. Types
 - a. Employee's exemption certificate (W-4 form)
 - b. Employee's time card
 - c. Employee's earnings record
 - d. Payroll register
 - e. Payroll check
 - 2. Preparing payroll forms
 - a. Employee's earning record
 - b. Payroll register
 - c. Payroll check

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. This unit may be completed using a ten-key keypad on a computer or calculator. You may want to have students practice on the ten-key pad before beginning this unit.
2. If the workbook you are using has problems about payroll and tax procedures, they may be used in lieu of the ones found in this unit. The activities provided in this unit may be used as a pre-test, review, or reteach, as needed.
3. A suggested audiovisual is "Handling Financial Responsibilities" available through the Occupational Curriculum Lab, East Texas State University.
4. Prepare transparencies and duplicate forms for payroll and tax reporting activities.
5. Discuss the terms and definitions relative to this unit. Add additional terms that you feel are necessary or that are mentioned during the discussion.
6. Discuss the types of forms and procedures used in preparing the payroll. Provide additional samples obtained from local businesses to illustrate the various types that may be used in your area.
7. Try to secure an actual payroll check stub. Let students identify the deductions.
8. Invite someone from the local internal revenue office to talk to the students about income tax reporting.
9. Secure income tax information from the internal revenue office for distribution to the students. If someone from the IRS is coming to your class as a guest speaker, ask him/her to bring enough copies of information to provide each student with a copy.
10. A field trip to a local business which incorporates the computer in the preparation of payroll might interest the students and reinforce the learning activities.
11. Assign a payroll simulation activity as follows:

Assume you are employed by Movie Video Center, and it is your responsibility to prepare the payroll records and pay checks. You will be given tax tables, sample employees' earnings records (headings included), weekly time records, payroll register, sample payroll checks, and the necessary supplies. Perform the steps required to prepare the payroll records and pay checks.

12. Assign a simple income tax simulation as follows:

Assume you are figuring the income tax for a friend. You will be provided a W-2 form, a 1040 form, a list of deductions, and other necessary information. Complete IRS form 1040 for your friend.

RESOURCES

TEXT/WORK BOOKS

THE ADMINISTRATIVE SECRETARY
Gregg Division/McGraw-Hill Book Co.

BANKING AND CREDIT OCCUPATIONS
Prentice-Hall Media

CENTURY 21 ACCOUNTING
South-Western Publishing Co.

CLERICAL PAYROLL PROCEDURES
South-Western Publishing Co.

DEVELOPING BOOKKEEPING SKILLS
AMSCO School Publications

GENERAL OFFICE PROCEDURES FOR COLLEGES
South-Western Publishing Co.

OFFICE MACHINES
Houghton-Mifflin Publishing Co.

OFFICE MACHINES COURSE
South-Western Publishing Co.

OFFICE PROCEDURES, 2nd ed.
MPC Educational Publishers

SECRETARIAL OFFICE PROCEDURES FOR COLLEGES
Gregg Division/McGraw-Hill Book Co.

SMALL BUSINESS MANAGEMENT
Delmar Publishers

SOFTWARE

BANKING-MICROCOMPUTER JOB SIMULATOR SERIES
1 disk, student manual and documents needed
Apple II or IIe
TRS-80 Model III

MICROCOMPUTER KEYPAD OPERATIONS
1 disk and documentation for: Apple,
TRS-80 Model III or IV, IBM-PC
Career Aids, Inc.

DATA ENTRY SIMULATION
Career Publishing, Inc.

MEDIA

CHECK WRITING PROGRAM
Videos
Career Aids, Inc.

A GUIDE TO CHECKING AND SAVINGS ACCOUNTS
Filmstrips with cassettes
Career Aids, Inc.

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE
Audiovisual Package
Occupational Curriculum Laboratory
East Texas State University

THE PAYCHECK PUZZLE
Videos
Career Aids, Inc.

PRACTICE SETS

ACTIVITIES HANDBOOK FOR TEACHING WITH THE HAND-HELD CALCULATOR
Allyn and Bacon

BANK RECONCILIATION PROJECTS
Glencoe Publishing Co.

CAPITOL AUDITING SERVICE: A CALCULATOR SIMULATION
Houghton-Mifflin Publishing Co.

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE
Audiovisual package
Occupational Curriculum Laboratory
East Texas State University

RPM UNLIMITED: A BUSINESS MACHINES PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

OSS/Financial Management
Unit 2: Payroll and Tax Reporting

*SECURITY FIRST-BANK-A BANKING
CUSTOMER SIMULATION*
South-Western Publishing Co.

STANDARD PAYROLL PROJECT
Glencoe Publishing

SECTION VIII
COMMUNICATIONS

ESSENTIAL ELEMENTS

75.87(i)(5)(A)(B)(C)

5. Concepts and skills necessary for effective communications.

The student should be provided opportunities to:

- (A) identify and use proper business techniques when using the telephone
- (B) prepare effective written communications; and
- (C) identify and use proper language usage skills in business.

SUGGESTED UNIT LESSON PLAN
SECTION VIII: COMMUNICATIONS
UNIT I: COMMUNICATION SKILLS

ESSENTIAL

ELEMENT: 75.87(i)(5)((C)

ALLOCATED TIME: 5/10 HOURS

UNIT

OBJECTIVE:

The student will be provided opportunities to identify and use proper language usage skills in business.

STUDENT

COMPETENCIES:

After completing this unit, the student should be able to:

1. Define language usage.
2. Identify major skills needed for proper language usage.
3. Recognize the importance of acquiring proper language usage skills.

FOCUS:

Proper language skills play an important role in our daily lives. These skills are mirrors into our character and personality. As they mirror our personal lives, so also do they present an image in the business world. To meet the demand of the modern business world requires proper speaking and writing skills.

DOMAINS:

Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS:

Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Definition of language
 - A. Communication
 - B. Usages
 - 1. Orally
 - 2. Written
 - C. Language usage
 - 1. Rhetoric
 - 2. Grammar
 - 3. Tone
- II. Language Usage
 - A. Proper
 - 1. Skills needed for properly using oral language
 - 2. Skills needed for properly using written language
 - B. Improper language usage
 - C. Importance of proper language usage skills
 - 1. Personal
 - 2. Business

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. For an introduction to the section, show a film on "Communications." The Education Service Center may have one available.
2. Invite a guest speaker from business to introduce the unit. A suggested topic is "Communication Skills in Today's Office."
3. Secure several periodicals or articles on the importance of communication skills. Assign outside readings, or you may want to provide class time for readings.
4. Use questioning as a strategy to get into the unit. Ask questions such as: What is communication? What is language usage?
5. Design a bulletin board showing major language usage skills.
6. Assign to students a brief written report on the history of the English language. Students could help design a bulletin board displaying Old English, Middle English, and Modern English.

(NOTE: An English grammar unit is included in Appendix H. It could be used as a pre-test, reteach activity, review, or whatever you feel is needed.)

7. Whenever appropriate, assign the activities to be completed using the keyboard. Students will gain practice in keyboarding.

RESOURCES

TEXT/WORKBOOKS

A BETTER WAY OF WRITING
South-Western Publishing Co.

BASIC ENGLISH FOR BUSINESS COMMUNICATIONS
Glencoe Publishing Co.

BASIC LETTER AND MEMO WRITING
South-Western Publishing Co.

BUSINESS COMMUNICATION
South-Western Publishing Co.

BUSINESS COMMUNICATIONS—A PROBLEM SOLVING APPROACH
Gregg Division/McGraw-Hill Book Co.

BUSINESS CORRESPONDENCE/30
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH/30
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH AND COMMUNICATION
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH ESSENTIALS
Gregg Division/McGraw-Hill Book Co.

BUSINESS LETTERS AND REPORTS
Bobbs-Merrill Publishing Co.

BUSINESS LETTER WRITING
Instructive Materials Laboratory
Ohio State University

THE BUSINESS OF ORAL COMMUNICATION
South-Western Publishing Co.

BUSINESS SPELLING AND WORD POWER
Bobbs-Merrill Publishing Co.

COMMUNICATIONS AT WORK
South-Western Publishing Co.

COMMUNICATION SKILLS FOR THE PROCESSING OF WORDS
South-Western Publishing Co.

COURTESY UNDER PRESSURE
South-Western Publishing Co.

DEVELOPING LISTENING SKILLS
Gregg Division/McGraw-Hill Book Co.

EFFECTIVE BUSINESS COMMUNICATION
South-Western Publishing Co.

EFFECTIVE ENGLISH FOR BUSINESS COMMUNICATIONS
South-Western Publishing Co.

ORAL AND WRITTEN COMMUNICATIONS
Career Aids, Inc.

TYPING MAILABLE LETTERS
Gregg Division/McGraw-Hill Book Co.

UNDERSTANDING HUMAN COMMUNICATIONS
Adler, Rodman, Holt, Rinehart and Winston

WRITING CLEARLY: CONTEMPORARY APPROACH
Charles E. Merrill Publishing

WRITING, LISTENING, SPEAKING FOR BUSINESS AND PROFESSIONAL STUDENTS
Wadsworth Publishing

SOFTWARE

COMMUNICATIONS: YOUR BRIDGE TO OTHERS
disk; Apple II, IIE, or IIC
IBM PC
Career Aids, Inc.

ON THE JOB COMMUNICATION
disk; Apple II, IIE or IIC; TRS-80
Model III or IV
Teacher's guide
Career Aids, Inc.

PRACTICE SETS

BUSINESS COMMUNICATIONS
Activities book and teacher's guide
Glencoe Publishing Co.

CORRESPONDENCE

Film trainee work plan
Prentice-Hall Media

PUBLIC SPEAKING

Business Professionals of America Official Guide

SPEAKING TECHNIQUES

Business Professionals of America Official Guide

WRITTEN COMMUNICATIONS

Business Professionals of America Official Guide

MEDIA

BASIC WRITING SKILLS FOR BUSINESS

4 filmstrips and cassettes, 16 duplicating masters,
teacher's guide, resource manual and storage con-
tainer
Career Aids, Inc.

BODY LANGUAGE

Career Aids, Inc.

**COMMUNICATIONS: YOUR BRIDGE TO
OTHERS**

Career Aids, Inc.

**COMPETENCY SKILLS: WRITING ON THE
JOB**

Filmstrips, cassettes, library kit, teacher's guide
Career Aids, Inc.

**DEVELOPING AND IMPROVING WRITTEN
COMMUNICATIONS: WRITING BUSINESS
LETTERS**

An Audiovisual Package
Occupational Curriculum Laboratory
East Texas State University

THE LISTENING INVENTORY

Career Aids, Inc.

**PERSON TO PERSON: LEARNING TO COM-
MUNICATE**

Career Aids, Inc.

WRITTEN COMMUNICATIONS SERIES

Slide/tape, guide, and assignments
Instructional Materials Lab
University of Missouri

SUGGESTED UNIT LESSON PLAN
SECTION VIII: COMMUNICATIONS
UNIT II: WRITING SKILLS

ESSENTIAL ELEMENTS: 75.87 (i) (5)(B)

ALLOCATED TIME: 5/10 hours

UNIT

OBJECTIVE: Students should be able to apply the guidelines for effective written communications.

STUDENT

COMPETENCIES: After completing this unit, the student should be able to:

1. Discuss the advantages of written communications.
2. Identify four major types of business letters.
3. Compose a business letter.
4. Format a business letter.

FOCUS:

Written communication skills are necessary in business offices of today. The beginning office worker needs to gain experience in the basic written communication areas in order to be knowledgeable and to contribute to the productivity of the business office.

DOMAINS:

Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS:

Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Written communications
 - A. Purposes of written communications
 - B. Advantages and disadvantages of written communications
- II. Techniques of writing business letters
 - A. Steps in composing letters
 - B. Criteria for composing a business letter
 - C. Ideas to consider when composing letters
 - D. Use standard writing guidelines
 - E. Hints for writing business letters
 - F. Types of business letters

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objective
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Obtain samples of letters from various businesses in the community to use during the discussion of effective written communications.
2. Obtain the slide/tape presentation "Developing and Improving Written Communication: Writing Business Letters" from the Occupational Curriculum Laboratory. Preview the presentation, and determine how it will be used with the unit.
3. Prepare transparency masters for use on an overhead projector and/or as handouts for the students.
4. Arrange for a person from the business community to speak to the class on the importance of acquiring communication skills.
5. Design a bulletin board introducing the unit.
 - (1) Include samples of the four basic types of business letters, and label each to indicate the type of letter.
 - (2) Include samples of business letters obtained from the business community.
6. Discuss the purposes of business communications.
7. Discuss the four basic types of business letters. Use transparency masters to clarify how to compose each of the letter types and to point out how each of the letters follow the format suggested.
8. Discuss the steps in composing letters. Provide a situation for writing a letter and demonstrate the step-by-step procedures for composing the letter.
9. Discuss the points to consider when striving for good human relations in business communication.
10. Shows various types of stationery. Explain quality of paper, logo, color, etc.

RESOURCES

TEXT/WORKBOOKS

A BETTER WAY OF WRITING
South-Western Publishing Co.

BASIC ENGLISH FOR BUSINESS COMMUNICATIONS
Glencoe Publishing Co.

BASIC LETTER AND MEMO WRITING
South-Western Publishing Co.

BUSINESS COMMUNICATION
South-Western Publishing Co.

BUSINESS COMMUNICATIONS--A PROBLEM SOLVING APPROACH
Gregg Division/McGraw-Hill Book Co.

BUSINESS CORRESPONDENCE/30
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH/30
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH AND COMMUNICATION
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH ESSENTIALS
Gregg Division/McGraw-Hill Book Co.

BUSINESS LETTERS AND REPORTS
Bobbs-Merrill Publishing Co.

BUSINESS LETTER WRITING
Instructive Materials Laboratory
Ohio State University

THE BUSINESS OF ORAL COMMUNICATION
South-Western Publishing Co.

BUSINESS SPELLING AND WORD POWER
Bobbs-Merrill Publishing Co.

COMMUNICATIONS AT WORK
South-Western Publishing Co.

COMMUNICATION SKILLS FOR THE PROCESSING OF WORDS
South-Western Publishing Co.

COURTESY UNDER PRESSURE
South-Western Publishing Co.

DEVELOPING LISTENING SKILLS
Gregg Division/McGraw-Hill Book Co.

EFFECTIVE BUSINESS COMMUNICATION
South-Western Publishing Co.

EFFECTIVE ENGLISH FOR BUSINESS COMMUNICATIONS
South-Western Publishing Co.

ORAL AND WRITTEN COMMUNICATIONS
Career Aids, Inc.

TYPING MAILABLE LETTERS
Gregg Division/McGraw-Hill Book Co.

UNDERSTANDING HUMAN COMMUNICATIONS
Adler, Rodman, Holt, Rinehart and Winston

WRITING CLEARLY: CONTEMPORARY APPROACH
Charles E. Merrill Publishing

WRITING, LISTENING, SPEAKING FOR BUSINESS AND PROFESSIONAL STUDENTS
Wadsworth Publishing

PRACTICE SETS

BUSINESS COMMUNICATIONS
Activities book and teacher's guide
Glencoe Publishing Co.

CORRESPONDENCE
Film trainee work plan
Prentice-Hall Media

PUBLIC SPEAKING
Business Professionals of America Official Guide

SPEAKING TECHNIQUES
Business Professionals of America Official Guide

WRITTEN COMMUNICATIONS
Business Professionals of America Official Guide

OSS/Communications
Unit 2: Writing Skills

MEDIA

BASIC WRITING SKILLS FOR BUSINESS

4 filmstrips and cassettes, 16 duplicating masters, teacher's guide, resource manual and storage container
Career Aids, Inc.

BODY LANGUAGE

Career Aids

COMMUNICATIONS: YOUR BRIDGE TO OTHERS

Career Aids

COMPETENCY SKILLS: WRITING ON THE JOB

Filmstrips, cassettes, library kit, teacher's guide
Career Aids, Inc.

DEVELOPING AND IMPROVING WRITTEN COMMUNICATIONS: WRITING BUSINESS LETTERS

An Audiovisual Package
Occupational Curriculum Laboratory
East Texas State University

SUGGESTED UNIT LESSON PLAN

SECTION VIII: COMMUNICATION SKILLS

UNIT III: TELEPHONE SKILLS

ESSENTIAL ELEMENTS:	75.87 (i)(5)(A)	ALLOCATED TIME:	8/10 Hours
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**UNIT
OBJECTIVE:** Students will be provided opportunities to identify and use proper techniques when using the telephone.

**STUDENT
COMPETENCIES:** After completing this unit, the student will be able to:

1. Properly define traditional telephone usage.
2. Describe types of telephone equipment and systems.
3. Recognize four types of special telephone equipment.
4. Differentiate between special telephone features.
5. Distinguish between the types of telephone services.
6. Practice good telephone pronunciation and articulation techniques.
7. Demonstrate positive techniques of handling incoming and placing outgoing telephone calls.
8. Compare the various parts of the telephone directory.
9. Log long-distance telephone calls.

FOCUS: The telephone is a vital link between business and the public. Companies expect proper telephone skills of the beginning worker.

DOMAINS: Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS: Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Traditional telephone techniques
 - A. Telephone service industry
 - B. Telephone equipment and systems
 - C. Criteria for selection of a long-distance carrier
 - D. Types of special telephone equipment
 - E. Special telephone features
 - F. Types of telephone services
- II. Telephone techniques
 - A. Projecting a good telephone image
 - B. Pronunciation/articulation techniques
 - C. Handling incoming telephone calls
 - D. Placing outgoing telephone calls
 - E. Using the telephone directory and directory assistance
 - F. Logging long-distance telephone calls

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Prepare bulletin boards with pictures of various types of telephone equipment, a comparison of telephone techniques for incoming and outgoing calls, supplies, etc.
2. Make arrangements to use the teletrainer.
3. Secure several dictation machines or tape recorders for use with the units.
4. Secure video, slide tape, or film about telephoning techniques.
5. Check with your students to see if any parents have cellular phones or paging equipment. Invite parents who have cellular phone/pagers to visit the class to demonstrate and explain the equipment
6. Provide students with current periodicals and/or access to the school library for research.
7. Have someone from the local telephone company discuss telephone techniques and demonstrate various types of telephone equipment for the class.
9. Discuss impact of computers on telephone equipment.

RESOURCES

TEXTBOOKS

APPLIED SECRETARIAL PROCEDURES
Gregg Division/McGraw Hill Book Co.

COMMUNICATIONS STUDY GUIDE UNIT 1
COMPUTER FUNDAMENTALS FOR AN INFORMATION AGE
Shelly and Cashman

THE COMPLETE HANDBOOK OF PERSONAL COMPUTER COMMUNICATIONS
St. Martin's Press

COMPUTER CONCEPTS
SRA

COMPUTER INFORMATION SYSTEMS
South-Western Publishing Co.

COMPUTERS TODAY
Gregg Division/McGraw Hill Book Co.

THE ELECTRONIC OFFICE
Prentice-Hall

ESSENTIAL GUIDE TO BULLETIN BOARD SYSTEMS
Meckler Publishing Corp.

GUIDE TO IBM PC COMMUNICATIONS
Borland, Osborne, and MicroPro
McGraw-Hill Publishers

HOW TO LOOK IT UP ON-LINE
St. Martin's Press

INTENSIVE OFFICE SKILLS REVIEW
South-Western Publishing Co.

INTRODUCTION TO BUSINESS TELECOMMUNICATIONS
Charles E. Merrill Publishing Co.

INTRODUCTION TO COMPUTERS AND INFORMATION PROCESSING
Reston Publishing Co., Inc.

INTRODUCTION TO TELECOMMUNICATIONS
Occupational Curriculum Lab
East Texas State University

LOCAL AREA NETWORKS
Borland, Osborne, and MicroPro
McGraw-Hill Publishers

NATIONAL DIRECTORY OF BULLETIN BOARD SYSTEMS

OFFICE AUTOMATION
AMACOM

OFFICE PROCEDURES
Gregg Division/McGraw Hill Book Co.

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

SOUTHWESTER BELL AIDS TO EDUCATION PROGRAM
Southwestern Bell Telephone Co.

TELECOMMUNICATION: CONCEPTS, DEVELOPMENT, AND MANAGEMENT
Bobbs-Merrill Educational Publishers

TELEPHONE COMMUNICATIONS
Prentice-Hall Media, Service Code H

TELEPHONE TECHNIQUES
Milady Publishing Co.

USING SPRINT
Borland, Osborne, and MicroPro
McGraw-Hill Publishers

OSS/Communications
Unit 3: Telephone Skills

MEDIA

BUSINESS TELEPHONE ETIQUETTE

Slide-Tape Presentation

(Includes teacher's guide, student booklet and competency tests)

East Texas Curriculum Laboratory

East Texas State University

COMMUNICATING ON THE JOB

FILM, CASSETTES, TEACHER MANUAL

Career Aids, Inc.

ELECTRONIC MAIL Milady Publishing Co.

OFFICE COMMUNICATION

filmstrips, trainee work plan

Prentice-Hall Media

TELEPHONE COURTESY PAYS

LISTENING UNDER PRESSURE

Video/w/facilitator's guide and posters

Career aids

TELEPHONE DYNAMICS

Western Tape

TELEPHONE TECHNIQUES

2 color filmstrips w/cassettes

Career Aids

TELEPHONE TECHNIQUES

Student activity and competency test packets

Occupational Curriculum Lab

East Texas State University

TELEPHONE USE ACTIVITY PACK

J. Weston Walch

SOFTWARE

INFORMATION FOCUS

Random House School Division

NEWSROOM

Springboard

THE OTHER SIDE

Tom Snyder Productions

PRO-COM-A

Prometheus

WORD JUGGLER

Quark

WRITE AWAY

Peregrine Software

ON-LINE SERVICES

TELECOMMUNICATIONS SIMULATORS

THE ELECTRONIC MAILBAG

An electronic mail simulator with a complete curriculum. Multi-boot permission is granted for up to three computers.

Exsym

THE ELECTRONIC VILLAGE

A site-licensed simulation and tutorial introduction to telecommunications and bulletin board systems. Also comes with materials in telecommunications ethics.

Exsym

GBBS "PRO"

Apple-based bulletin board software simulation.

Micro Data Products

INFORMATION CONNECTION

A package which simulates an on-line information search using a limited version of the Grolier-on-line encyclopedia currently available on CompuServe.

Grolier Electronic Publishing

WINDOW ON TELECOMMUNICATIONS

A unique, site-licensed telecommunications vocabulary simulator

Exsym

CLOSURE FOR OFFICE SUPPORT SYSTEMS

This section provides a closure to the course Office Support Systems. The section includes review of course objectives, sections, units, and student competencies. Suggestions for course and student evaluations are also included.

SUGGESTED UNIT LESSON PLAN

CLOSURE FOR OFFICE SUPPORT SYSTEMS

ALLOCATED
TIME: 3 Hours

**UNIT
OBJECTIVE:**

Students will be able to analyze, evaluate, and demonstrate proficiency in course content.

**STUDENT
COMPETENCIES:**

After completing this unit, the student should be able to:

1. Relate the objectives of the course Office Support Systems to personal success and the office environment.
2. Analyze section and unit contents in relation to the course objectives.
3. Recognize levels of competency performance.
4. Assess the course in terms of objectives and content.
5. Complete a course examination with a score of 70% or better accuracy.

FOCUS:

An important component of the learning process is closure. Closure may be considered as a review, a summation, or a conclusion. The student is led to see how the parts make up or contribute to the whole. A final question needs to be answered: "Has the course accomplished its primary objective?"

DOMAINS:

Activities and competency tests have been designed to provide learning experiences utilizing the cognitive, psychomotor, or affective domains. Activities and competency tests are coded on the Activity and Competency Test Matrices.

BASIC SKILLS:

Activities and competency tests have been designed to reinforce the basic skills of reading, writing, and/or mathematics. Activities and competency tests have been coded on the Activity and Competency Test Matrices.

CONTENT OUTLINE

- I. Review of course objectives
- II. Review of sections and units
 - A. Information Processing Concepts
 - B. Proofreading and Correcting Errors
 - C. Keyboarding Applications
 - D. Securing Employment
 - E. Maintaining Employment
 - F. Human Relation Skills
 - G. Alphabetical Filing
 - H. Numerical Filing
 - I. Other Filing Systems
 - J. Incoming and Outgoing Mail
 - K. Electronic Mail
 - L. Role of Business in Free Enterprise System
 - M. Responsibilities of Employees
 - N. Checking Account
 - O. Payroll and Tax Reporting
 - P. Communication Skills
 - Q. Writing Skills
 - R. Telephone Skills
- III. Analysis of Student Competencies
- IV. Course Evaluation
- V. Examination

SUGGESTED TEACHER ACTIVITIES

General Teacher Preparation

1. Preview unit
2. Review unit objectives
3. Make instructional analysis
4. Assess student learning needs
5. Decide on lesson domain: cognitive, psychomotor, or affective domain
6. Select instructional materials based on instructional analysis and student learning needs
7. Select instructional strategies based on lesson content and student learning needs
8. Prepare lesson plans from the unit lesson
9. Prepare additional instructional material
10. Reserve necessary media and equipment

Teacher Presentation

1. Present student objectives
2. Establish rapport with students
3. Review lesson objectives with students
4. Relate lesson to prior or future learning
5. When appropriate, encourage student interaction through questioning, discussions, or some other strategy
6. Emphasize the value/importance of the unit or activity
7. Allow time for closure of a lesson

Reteach Activities

1. Identify area(s) of weakness from results of evaluation
2. Select unit activities not previously used
3. Use additional resources and/or create materials based on student learning needs
4. Use a different teaching strategy in reteaching
5. Retest

Specific Teaching Suggestions

1. Design a bulletin board for Office Support Systems. Suggestions are: WHAT I HAVE LEARNED FROM OSS; MY BEST FROM OSS; AFTER OSS, WHAT?
2. Review overhead transparencies included with Section I on course objectives.
3. Discuss with students the objectives of the course.
4. Divide students into groups. Assign to each group a section to be reviewed and presented to the class. The review might include: competencies, synopsis of units, and/or importance of units. Have the other students take notes.
5. Hand out the listing of competencies to the class. Have each student rate what he/she considers to be his/her level of performance for each competency.

Suggested levels of performance might include: M (minimum), 1; F (fair), 2; A (average), 3; or M (mastery). The instructor will need to determine what criteria constitutes the levels. Collect these sheets and tally the information for each of the competencies. Use this information when planning for the next year. Make revisions in your teaching style, presentation, etc., for competencies that a majority of the students feel they have achieved only a minimal mastery.

6. Assign students review questions to develop for the examination. Provide the student with the procedures for keying in the questions. Make copies of each group's questions and answers for the remaining class members. Review these with the students. Inform the students that you will be adding some questions of your own. Provide the students with examples. Give an examination from these questions.
7. Give examples for the type of psychomotor skills you will be testing.
8. Assign time for students to review for their examination. Be sure they know the correct answers to the questions and/or activities.

APPENDIX A

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APPENDIX B

APPENDIX B

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Teletrainer

Photocopy machine

Overhead projector with low heat/good cooling system

Pull down movie screen

Marker boards instead of chalkboards

Adjustable copy stands

Adjustable student work stations at appropriate height

Adjustable chairs, preferably rolling

Appropriate software:

Keyboarding

Tutorial

APPENDIX C

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ACKNOWLEDGEMENT

The module 7 Overview of the Vocational Special Needs Teachers Training Curriculum has been reprinted with permission as this appendix. Teachers are encouraged to refer to the original publication to learn more about working with special needs populations. The character font size and line spacing have been changed in this appendix to save space.

The project was developed in 1987 by Craig R. Colby, Ed.D. of Texas A&M University. Linda H. Parrish, Ph.D., Texas A&M University, and Jerry L. Wircenski, Ph.D., North Texas State University, were the project directors.

The vocational special needs teacher training curriculum was developed pursuant to a contract with the Texas Education Agency's Vocational Education Special Projects. Contractors or grantees undertaking such projects under Agency sponsorship are encouraged to freely express their professional judgement in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Texas Education Agency position or policy.

This information is presented as an appendix to help Office Education teachers with planning the modification of instruction for special populations. Many of the concepts and ideas presented are sound practices to be used with normal populations.

The entire 10 module training curriculum is available through the Extension, Instruction and Materials Center, University of Texas at Austin, P.O. Box 7218, Austin, Texas 78713-7218.

Some of the text has been modified or omitted to make it more relative to office education.

CURRICULUM MODIFICATION

The term "vocational curriculum" can be defined as the organized content of a particular discipline which a student must master to attain an occupational goal. It involves the sum total of all experiences and learning activities encountered in the classroom. A curriculum is concerned with results. It encompasses "what is to be taught" and "what is to be learned" (Stern-Otazo, 1980; Goh & Sitlington, 1983).

Each student has a mental capacity, physical skills, and various needs which vary from one individual to the other. In addition, students exhibit different learning styles. All good teachers recognize this and will work toward developing a classroom environment which is characterized by a deep respect for the learner, acceptance of student, fulfillment of individual needs, and individual development. This is what is meant by the teacher who has become "learner-centered" and not "content-centered" (Pine & Boy, 1977). Jones (1977) eloquently describes recognizing individual worth and individual development as being the basis for curriculum development as follows:

Individual development as a basis for curriculum perspective would lead us to teach discovery of principles and sacredness of the individual personality. It would teach the learners to view themselves as self-actualizing individuals in a setting designed to support and encourage personal development to the ultimate of one's potential. Attempts to improve the local community would center around providing a richer and fuller life for personal growth and development. Good people make good communities, good states, good nations, and good world. By emphasizing development of individuals, such a curriculum would hope to plant the seed for a better world in the future.

Therefore, all learners should be perceived as a very "special" individuals who one day will take their place in society. It is the responsibility of educators to assist all learners (in spite of their shortcomings) to become productive members of society. This can be accomplished by helping each student establish attainable career goals and then providing meaningful experiences through which the student can achieve these goals. Every student should be treated with dignity, as an individual who has unique strengths and interests in life. It is not necessary or even realistic to expect every student to do and know all the same things. As stated by Jones (1977), "Learners should become worthwhile persons in their own right,...it is not necessary that they all become miniature images of the same pattern."

Purpose of Curriculum Modification

When working with students with special needs, a learner's curriculum may need to be modified or adjusted to take into account major differences which could be found among these individuals. The term "curriculum modification" can be defined as tailoring an existing curriculum to the unique needs of students as they pursue an occupational goal (Sarkees & Scott, 1985; Goh & Sitlington, 1983). However, it should be strongly emphasized that modifying a curriculum does not mean that an educator should lower or alter the standards of his or her program. What it does mean is that the Admission Review and Dismissal (ARD) Committee (for handicapped students) or coordinated planning team (for disadvantaged and LEP students) determines which essential elements in the regular school curriculum would be appropriate for a student's needs. The State Board Of Education Rules For Curriculum offers the following key points (Texas Education Agency, 1985):

1. For students with special needs, school districts shall provide modifications in methodologies, pacing, and materials to ensure that instruction is delivered, as appropriate, in the essential elements.
2. Students with special needs shall be instructed in those same essential elements in a manner appropriate to their needs.
3. School districts shall implement the provisions (under Chapter 75) in a manner which will enable all students to participate actively in a well-balanced curriculum and master, to the best of their abilities, the knowledge, skills, and competencies established through the essential elements.
4. Specialized personnel and regular program personnel shall be jointly responsible for the cooperative delivery of effective instruction in the essential elements, as appropriate.

It is important to re-emphasize that special needs students, as all students, have capabilities which widely vary. The challenge parents, educators, and vocational counselors face is to help each learner reach occupational goals which are within the student's potential.

The Curriculum Modification Process

For the purpose of this overview, the competency-based curriculum modification model has been selected for discussion.

For information regarding the steps involved in the modification process including the establishment of an ARD committee and developing the IEP plans, refer to the 1989 TEA publication, Office Education Handbook.

The Competency-Based Curriculum

Over the years, the concept of competency-based curriculum has increased in popularity largely due to the emphasis on accountability in education (Choate, et al., 1987). In addition, since the passage of P.L. 94-142, vocational educators have had to adjust their curricula to take into account the capabilities of special needs learners.

The underlying principle behind the competency-based curriculum is to assist the student in becoming a more effective person. This entails helping the student develop skills or competencies which will promote employment opportunities and a higher self-esteem within the student (Brolin, 1976; Lippmann & Porter, 1976). The ability to succeed is what makes competency-based learning so valuable for students with special needs (Kok, 1978). With competency-based learning a student does not have to wait until the end of the program to experience success. The sequential steps called for throughout the program afford the possibility of success on a day-to-day basis (Lippmann & Porter, 1976).

The concept of competency-based learning is relatively simple. Based upon the learner's assessment information, the educator establishes specific goals (competencies) which will help the student "function adequately as a consumer, a producer, a learner, and a citizen" (Parnell, 1973). For example, in an office education class, the student's occupational program goals or competencies may include one or more of the following: (a) keyboarding, (b) calculating percentages, (c) proofreading documents, (d) composing

correspondence, or (e) filing correspondence. Next, the educator develops objectives and an individualized instructional plan for the student to follow. This individualized instructional plan includes: (a) an objective, (b) an introduction, (c) a learning activity, (d) a test/checklist, and (e) answers/feedbacks.

Therefore, in competency-based learning it is not necessary or even realistic for the instructor to expose every learner to all the aspects of a vocational program. Competency-based learning focuses on the quality of learning rather than the quantity of learning such that the student who has limited skills could still find employment (Kok, 1978).

Responsibilities of the Vocational Educator

The primary responsibility of the vocational educator in the curriculum modification process is to help the special needs student establish and reach realistic occupational goals. In an effort to accomplish this, the vocational educator must identify the following (Sarkees & Scott, 1985):

1. Pertinent information about what will be taught in a vocational program.
2. Necessary requirements for program completion.
3. Multiple exit points (jobs that the learner can prepare for in a vocational program).
4. Entry level competencies expected by employers for each of the exit points.

It is also the responsibility of every vocational educator to establish an effective and wholesome learning environment for their students. Providing this environment may involve modifying the vocational facility, equipment, tools and/or instruction. This information will be provided in the following section.

MODIFICATION OF THE LEARNING ENVIRONMENT

The term "learning environment" refers to both the physical and instructional setting of the vocational classroom/laboratory (Bell, 1984). It is the responsibility of each vocational educator to work at developing a learning environment which will contribute to the overall well-being and success of every student. The key factors found in a wholesome learning environment are those which promote:

1. **Safety, organization, and physical comfort.** In the vocational laboratory, it is absolutely crucial that each student abide by safety rules set by the instructor. In addition, the laboratory should be kept well organized and clean. A laboratory which is safe, well organized, and physically comfortable helps promote high morale and good work habits.
2. **Respect and acceptance.** Within an effective learning environment, students will show respect not only for the instructor but for each other as well. The instructor should be the student's best role model. The care and acceptance given by the instructor to each student (disabled or non-disabled) will go a long way in promoting peer acceptance, a positive attitude, and healthy self-esteem.
3. **Discipline.** A wholesome learning environment is one which promotes discipline and a positive self-concept within each student. Inappropriate behavior has the potential to seriously affect classroom safety, morale, and the overall learning process. Ways in which

the instructor can help the student modify inappropriate behavior include: (a) utilizing the time-out technique, (b) developing student-teacher contracts, (c) ignoring negative behavior--whenever possible, and (d) rewarding appropriate behavior with approval and praise.

4. **Flexibility.** An effective learning environment is flexible and can adapt to a special student's unique needs (i.e., slower rate of learning, inability to access regular tools/equipment, or remedial needs in reading or math for instance). A flexible environment fosters individualized programs through which a special learner can develop marketable skills for employment.

Modifying Facilities, Equipment, and Tools

In the past, many special needs learners have been denied their basic right to a public education because of architectural barriers, nonadaptive facilities, equipment, and tools (Phelps & Lutz, 1977). However, federal legislation has done a great deal to provide equal access to educational programs for every learner. For example, according to Section 503 of the Rehabilitation Act of 1973, each federally funded program or activity in which a handicapped individual can enroll and profit must be made accessible to the student (Sarkees & Scott, 1985). In addition, the Carl Perkins Act of 1984 has emphasized the importance of providing supplemental services for special needs learners, which include the adaptation of facilities, equipment, curriculum, and instruction (Cobb & Kingburg, 1985).

MODIFICATION OF INSTRUCTION

The primary purpose of this section is to provide the vocational educator with teaching strategies and techniques that will be useful when instructing students with special needs. It is important to remember that the methods and approaches used by educators when instructing non-special needs students may not be very effective with students with special needs (Gleiss-Monar & Sitlington, 1983). Therefore, individualizing instruction becomes vitally important in the successful instruction of special learners.

Within this section, the following topics will be discussed: (a) learning styles, (b) teaching strategies, (c) remediation techniques, and (d) Brown's 3-Cs Instructional Mode.

Learning Styles

Each special learner has unique needs and these needs affect how the student can best learn. For example, if a student is blind or has difficulty with "visual" learning, the instructor should stress the learner's sense of sight. Therefore, the manner in which a student with special needs learns ceases to be a preference, but becomes instead a necessity (Kok, Jernigan, & Hull, 1978). Further, one of the main philosophies behind individual learning styles is that learning should be a pleasant and successful experience. Educators, therefore, should adjust their style of teaching to allow students the benefit of learning in their preferred manner (Kok, Jernigan, & Hull, 1978).

Identifying a student's learning style

The following are methods in which an educator can identify a student's learning style:

1. **Informal observation.** One of the simplest and possibly best ways to identify a student's learning style is through informal observation. By observing the student as he or she negotiates classroom/laboratory learning activities, the educator can collect valuable information with regard to the student's learning style. For example, the educator may observe that a disadvantaged student answers questions in class and does well with hands-on activities but repeatedly fails written exams. If the primary intent of the instruction is to reach vocational skills rather than reading and writing skills, the instructor could modify their style of teaching by allowing the student to take oral and/or hands-on exams (Kok, Jernigan, & Hull, 1978; Sarkees & Scott, 1985).
2. **Teacher consultation.** Consulting other teachers (i.e., special education teachers, resource room teachers, support personnel, paraprofessionals, and other vocational education teachers) can be an excellent source for information regarding a student's learning style (Sarkees & Scott, 1985).
3. **Student/parent interviews.** Interviewing the student and student's parents/guardians can result in valuable insights as to the student's best learning modes (Sarkees & Scott, 1985).
4. **Standardized inventories.** Standardized inventories provide an alternative for students who are shy or uncomfortable during a personal interview. Information received from interest, personality, and learning style inventories can provide valuable information with regard to the student's learning style (Kok, Jernigan, & Hull, 1978; Sarkees & Scott, 1985).

DETERMINING LEARNING STYLES

For many years educators have recognized the need for alternative instructional methods and techniques to meet the needs of the variety of students in our heterogeneously grouped classrooms. We have become familiar with a variety of methods and techniques, but, in many cases, their misapplication has proven unproductive. Recognizing and defining the style in which a person learns is as important to the learning process as the diagnostic tests required by a medical doctor are to the healing process. Many teachers share the frustration of knowing that we are failing to meet the needs of some of the students in our classrooms. One reason could be the lack of understanding and accommodating the unique learning styles of our students--particularly those we are not reaching.

The CITE Learning Styles Instrument was formulated by teachers for the use of teachers in determining the styles preferred by their students. The Learning Styles Instrument is divided into three main areas: information gathering/receiving, social work conditions, and expressiveness preference. The Instrument is simple to administer, score, interpret and utilize in accommodating individual differences. It also is an instrument that offers immediate data, as well as accompanying information with suggestions for appropriate implementation. There are provisions being made for scoring, charting, and interpreting by the computer.

If we are to allow for individual differences, we must consider ways of learning, working, and reporting as three (3) important areas. In the area of learning, the CITE Learning Styles Instrument investigates five (5) specific sub-topics. They are:

1. Auditory Language: the way a student hears words; processing spoken words.
2. Visual Language: the way a student sees words; processing written language.
3. Auditory Numerical: the way a student hears numbers; processing spoken numerical values.
4. Visual Numerical: the way a student sees numbers; processing written numerical values.
5. Auditory-Visual-Kinesthetic: the way a student learns by doing or involvement. Emphasizing the experiencing or manipulative learning style which is almost always accompanied by either auditory stimuli, visual stimuli, or a combination of both. The area of working considers whether a student likes to work, or learn, in a group or alone. They are appropriately titled as follows:
 1. Group learner: A student who likes to work with at least one other person when there is important work to be done.
 2. Individual learner: A student who works and thinks best alone. This student is usually a self-starter and frequently finds working with other students distracting.

The area of individual expressiveness considers how a student prefers to express himself. Basically, they fall into one of these two broad categories:

1. Oral expressive: A student who prefers to say what he knows. Usually, answers or explanations are better given orally; however, some students may indicate this preference simply because they are too lazy to write things down.
2. Written expressive: A student who prefers to write down answers or explanations. Students who exhibit a reflective cognitive learning style may prefer this method.

The administration of the CITE Learning Styles Instrument is simple and can be done in a classroom with 30 or 35 students in less than 20 minutes. Students need only to have a pencil and a copy of the CITE Learning Styles Instrument. Directions should make very clear that the statements are not questions with right or wrong answers. They are just statements and the responses should represent the way the student feels. Emphasize that no grades are given, and, if they are to score it themselves, they will do the actual scoring and charting results. Explain how they are to mark the answers and do the Learning Styles example from the front page of the Instrument. Emphasize that they must make only one choice for each statement, but that they must respond to every statement. Usually their first choice is the best. Explain that as they read each statement, you will read it aloud. This is to accommodate those who prefer auditory to visual stimuli or for non-readers, and allow approximately 12 seconds to read and respond to each statement.

Encourage and allow questions from the students if they do not understand. Special solicitations for questions should be extended before the Learning Styles example is done, after it is done, before the first statement from the Instrument is read, after the third statement is read, after the last statement is read, and any other time when the need is apparent. After the Instrument is completed, it is necessary to check for one response to every statement. The students should be asked to put their names on each page of the Instrument; and, if the students are to score their own, the scoring procedure will begin.

The process of scoring the CITE Learning Styles Instrument using the computer is still being worked out. If you are a teacher in the Unified School District 259, computer scoring should be available during the fall of the 1975-76 school year. Presently, the simplest, and perhaps the most meaningful, method of scoring is to allow the student to score their own. Preparing students for this entails writing the names of the nine (9) construct areas the Instrument covers on the chalkboard or overhead projector and reading these names. The procedures listed here have been tried successfully in other classrooms and are easy to follow. Each student should be given pages headed "Learning Styles Worksheet," and "Learning Style Chart." The procedure for completing the worksheet follows:

1. The numbers listed under each of the nine (9) construct areas designate the statements on the Instrument which measure that particular style. For example, statements 5, 13, 21, 29, 37 all measure the visual language style of learning.
2. To determine the score for each style, do the following:
 - a. Look up the response given for each statement and write it in the right-hand column.
 - b. Total the numbers.
 - c. Multiply the sum of the numbers by two (2).

This is the score:

Example:

Visual Language

5 - 3

13 - 4

21 - 4

29 - 3

37 - 4

Suppose these are the
responses given on the
Learning Style Instrument

TOTAL $18 \times 2 = 36$

3. Figure the score for each of the nine (9) areas. If the score is 33 thru 40, the style is considered to be a major learning style for the student. From 20 thru 32 is a minor learning style for the student, and below 20 indicates the student uses this style to a negligible extent.

After computing each score, the students graph the results on the page headed "Learning Style Chart." The completed sample of the "Learning Style Chart" is on the following page.

Style usage may be defined as:

1. Major: The student prefers this mode of learning, feels comfortable with it, and uses it for important (to the student) learning. A student does not necessarily have one and only one preferred style.
2. Minor: The student uses this mode but usually as a second choice or in conjunction with other learning styles.
3. Negligible: The student prefers not to use this if other choices are available.

The following are descriptions of learning styles which can be found in every learner to a major, minor, or negligible extent. These descriptions will help you evaluate a student's learning style on the basis of observation. The CITE Learning Styles Instrument is a tool which facilitates the evaluation of these learning styles. Each of the nine (9) style areas of the CITE Instrument are described here as if the student were a major in that particular style.

1. Auditory Language: This is the student who learns from hearing words spoken. You may hear him vocalizing or see his lips or throat moving as he reads, particularly when he is striving to understand new material. He will be more capable of understanding and remembering words or facts that he could only have learned by hearing.
2. Visual Language: This is the student who learns well from seeing words in books, on the chalkboard, charts, or workbooks. He may even write words down that are given to him orally, in order to learn by seeing them on paper. He remembers and uses information better if he has read it.

3. **Auditory Numerical:** This student learns from hearing numbers and oral explanations. He may remember phone and locker numbers with ease, and be successful with oral numbers, games, and puzzles. He may do just about as well without his math book, for written materials are not as important. He can probably work problems in his head. You may hear him saying numbers to himself or see his lips moving as he reads a problem.
4. **Visual Numerical:** This student has to see numbers on the board, in a book, or on a paper, in order to work with them. He is more likely to remember and understand math facts if he has seen them. He doesn't seem to need as much oral explanation.
5. **Auditory-Visual-Kinesthetic Combination:** The A-V-K student learns best by experience—doing, self-involvement. He definitely needs a combination of stimuli. The manipulation of material along with the accompanying sight and sounds (words and numbers seen and spoken) will make a big difference to him. He may not seem to be able to understand, or be able to keep his mind on work unless he is totally involved. He seeks to handle, touch, and work with what he is learning. Sometimes just writing or a symbolic wiggling of the fingers is a symptom of the A-V-K learner.
6. **Individual Learner:** This student gets more work done alone. He thinks best, and remembers more, when he has learned by himself. He cares more for his own opinions than for the ideas of others. You will not have much trouble keeping this student from over-socializing during class.
7. **Group Learner:** This student strives to study with at least one other student, and he will not get as much done alone. He values other's opinions and preferences. Group interaction increases his learning and later recognition of facts. Class observation will quickly reveal how important socializing is to him.
8. **Oral Expressive:** This student can easily tell you what he knows. He talks fluently, comfortably and seems to be able to say what he means. You may find he knows more than his tests show, after talking to him about his work. He is probably not shy about giving reports or talking to the teacher or classmates. The muscular coordination involved in writing may be difficult for him. Organizing and putting thoughts on paper may be a too slow and tedious task for this student.
9. **Written Expressive:** This student can write fluent essays and good answers on tests to show what he knows. He feels less comfortable, perhaps even stupid, when he has to give oral answers. His thoughts are better organized on paper than when they are given orally.

The CITE Learning Styles Instrument is an attempt to help teachers become more familiar with their student's preference for learning and to make teachers more aware of the need to accommodate the variety of preferences exhibited by any class of students. Should this instrument show no significant data on a student, or should the teacher feel the data is not accurate, then further investigation should be made. Private talks between the teacher and student should follow. The student should be given choices of a variety of ways of learning and these choices noted on the student's records and compared with his Learning Style Chart. Personal observation by the teacher is also a helpful way of determining the student's learning style. If adequate diagnostic or counseling service is available, the use of these services will help in determining

learning style. Each of these other methods mentioned requires a great deal of time, effort, expertise, and one-to-one work. Sometimes the classroom teacher runs short on one or more of these. That is where the CITE Learning Styles Instrument is meant to help.

LEARNING STYLE

INSTRUCTIONS: Place all answers on the answer sheet. Circle the number which agrees with how you feel about the statement. A 4 indicates you agree that the statement is most like you and a 1 indicates that the statement is least like you.

1. When I make things for my studies, I remember what I have learned better.
2. Written assignments are easy for me to do.
3. I learn better if someone read a book to me than if I read silently to myself.
4. I learn best when I study alone.
5. Having assignment directions written on the board makes them easier to understand.
6. It's harder for me to do a written assignment than an oral one.
7. When I do math problems in my head, I say the numbers to myself.
8. If I need help in the subject, I will ask a classmate for help.
9. I understand a math problem that is written down better than one I hear.
10. I don't mind doing written assignments.
11. I remember things I hear better than I read.
12. I remember more of what I learn if I learn it when I am alone.
13. I would rather read a story than listen to it read.
14. I feel like I talk smarter than I write.
15. If someone tells me three numbers to add I can usually get the right answer without writing them down.
16. I like to work in a group because I learn from the others in my group.
17. Written math problems are easier for me to do than oral ones.
18. Writing a spelling word several times helps me remember it better.
19. I find it easier to remember what I have heard than what I have read.
20. It is more fun to learn with classmates at first, but it is hard to study with them.
21. I like written directions better than spoken ones.

22. If homework were oral, I would do it all.
23. When I hear a phone number, I can remember it without writing it down.
24. I get more work done when I work with someone.
25. Seeing a number makes more sense to me than hearing a number.
26. I like to do things like simple repairs or crafts with my hands.
27. The things I write on paper sound better than when I say them.
28. I study best when no one is around to talk or listen to.
29. I would rather read things in a book than have the teacher tell me about them.
30. Speaking is a better way than writing if you want someone to understand what you really mean.
31. When I have a written math problem to do, I say it to myself to understand it better.
32. I can learn more about a subject if I am with a small group of students.
33. Seeing the price of something written down is easier for me to understand than having someone tell me the price.
34. I like to make things with my hands.
35. I like tests that call for sentence completion or written answers.
36. I understand more from a class discussion, than from reading about a subject.
37. Spelling and grammar rules make it hard for me to say what I want to in writing.
38. It makes it easier when I say the numbers of a problem to myself as I work it out.
39. I like to study with other people.
40. When the teachers says a number, I really don't understand it until I see it written down.
41. I understand what I have learned better when I am involved in making something for the subject.
42. Sometimes I say dumb things, but writing gives me time to correct myself.
43. I do well on tests if they are about things I hear in class.
44. I can't think as well when I work with someone else as when I work alone.

LEARNING STYLES ANSWER SHEET

NAME:

DATE:

GRADE

Circle the number which agrees with how you feel about the statement. A 4 indicates you agree that the statement is most like you and a 1 indicates that the statement is least like you.

	LEAST LIKE ME			MOST LIKE ME
1.	1	2	3	4
2.	1	2	3	4
3.	1	2	3	4
4.	1	2	3	4
5.	1	2	3	4
6.	1	2	3	4
7.	1	2	3	4
8.	1	2	3	4
9.	1	2	3	4
10.	1	2	3	4
11.	1	2	3	4
12.	1	2	3	4
13.	1	2	3	4
14.	1	2	3	4
15.	1	2	3	4
16.	1	2	3	4
17.	1	2	3	4
18.	1	2	3	4
19.	1	2	3	4
20.	1	2	3	4

21.	1	2	3	4
22.	1	2	3	4
23.	1	2	3	4
24.	1	2	3	4
25.	1	2	3	4
26.	1	2	3	4
27.	1	2	3	4
28.	1	2	3	4
29.	1	2	3	4
30.	1	2	3	4
31.	1	2	3	4
32.	1	2	3	4
33.	1	2	3	4
34.	1	2	3	4
35.	1	2	3	4
36.	1	2	3	4
37.	1	2	3	4
38.	1	2	3	4
39.	1	2	3	4
40.	1	2	3	4
41.	1	2	3	4
42.	1	2	3	4
43.	1	2	3	4
44.	1	2	3	4

LEARNING STYLES WORKSHEET

VISUAL LANGUAGE

5 _____

13 _____

21 _____

29 _____

37 _____

Total _____ x 2 = _____ (Score)

AUDITORY NUMERICAL

7 _____

15 _____

23 _____

31 _____

39 _____

Total _____ x 2 = _____ (Score)

VISUAL NUMERICAL

9 _____

17 _____

25 _____

33 _____

41 _____

Total _____ x 2 = _____ (Score)

KINESTHETIC-TACTILE

1 _____

18 _____

26 _____

34 _____

42 _____

Total _____ x 2 = _____ (Score)

AUDITORY LANGUAGE

3 _____

11 _____

19 _____

36 _____

44 _____

Total _____ x 2 = _____ (Score)

SOCIAL INDIVIDUAL

4 _____

12 _____

20 _____

28 _____

45 _____

Total _____ x 2 = _____ (Score)

SOCIAL GROUP

8 _____

16 _____

24 _____

32 _____

40 _____

Total _____ x 2 = _____ (Score)

EXPRESSIVE-ORAL

6 _____

14 _____

22 _____

30 _____

38 _____

Total _____ x 2 = _____ (Score)

EXPRESSIVE-WRITTEN

2 _____

10 _____

27 _____

35 _____

43 _____

Total _____ x 2 = _____ (Score)

33-40 Major Learning Style _____

20-32 Minor Learning Style _____

20 Negligible _____ **158**

Teaching Strategies

Once the student's vocational goals, learning capability, and preferred learning style have been identified, the educator can begin to experiment with a variety of teaching techniques and instructional materials. When determining the teaching technique and instructional material best suited to meet a student's unique needs, it is important for the educator to be patient, open-minded, and flexible. Not every instructional technique and/or material can be used successfully with each learner (Sarkees & Scott, 1985). In addition, the educator should not hesitate to enlist the support of other instructors, school counselors, student aides, paraprofessionals, volunteers from the community, itinerant teachers, and/or interpreters. This pooling of efforts can result in increased student learning because of the variety of approaches and personal attention which can be brought to the classroom or laboratory (Harrington & Fardig, 1982).

The following are general guidelines and instructional techniques which an educator can use to help meet a special needs learner's unique needs and learning style:

1. **Orientation.** Students with special needs may need additional orientation with regard to:
(a) the relevancy of their individualized goals, (b) class procedures, (c) safety, etc.
2. **Flexible pacing.** Students with special needs can exhibit different rates of learning. The educator should provide flexibility in pacing of instruction and assignments to meet the various needs of learners. In general, students with special needs should be individually paced to maintain their progress and interest, yet avoid the frustrations and failure undue pressure may cause (Harrington & Fardig, 1982; Sarkees & Scott, 1985).
3. **Demonstration.** Utilization of the demonstration method can be very effective in introducing a new skill to a learner with special needs.
4. **Breaking material into small distinct steps.** As a general rule, it is important for the educator to break a learning concept into small distinct steps. In this way, the educator can best identify where the student is experiencing difficulty.
5. **Positive environment and feedback.** In general, students with special needs lack confidence and a positive self-concept. This is primarily due to their not having had much success in life. In addition, the few successes special learners do have usually result in little, if any, positive reinforcement (i.e., praise, reward, and/or encouragement). Therefore, it is incumbent upon educators to create a positive, nonthreatening learning-environment for their students and to make generous use of positive feedback when the student experiences success. Constructive criticism should not be avoided; however, it should be given in a positive manner (i.e., students should understand that their behavior or product is what's being criticized and not their worth as a human being). Finally, all students must learn that mistakes and constructive criticism are a normal and expected part of life (Harrington & Fardig, 1982).
6. **Use of peer tutors, college students, and volunteers.** Use of peer tutors, college students, and volunteers can greatly assist a vocational educator's work with special learners by: (a) helping with individualized instruction, (b) providing positive role models, (c) increasing student participation, (d) increasing the special learner's success experiences, (e) in-

creasing the student's confidence and self-esteem, and (f) improving the special learner's social and academic skills (Asselin & Anderson, 1986). In addition, peer tutors, college students, and volunteers can receive teaching experience and the satisfaction of helping individuals with special needs progress.

7. **Flexible grouping.** The educator can integrate special needs learners into groups of various sizes (according to the student's goals, interests, or ability level) and utilize peer tutors, college students, and volunteers for assistance. According to Sarkees & Scott, grouping students has the following advantages: (a) it allows the teacher more time to work among the students, (b) it allows the teacher to individualize instruction, tasks, and assignments to meet the needs of students in a specific group, (c) it provides special needs learners with an opportunity to work with peers and establish positive interpersonal and working relationships with them, (d) it serves as a motivating factor for special needs learners because the individualized nature of the group work does not become threatening or frustrating but allows students an opportunity to work at their own pace through their strongest learning style, (e) it allows teachers to arrange for instruction for the entire class, small group discussions, project groups, and small remedial sessions so that instruction will be diversified and more meaningful for all students; and (f) it allows the teacher to modify the task or assignment for a small group of students with specific needs, as in the case of learners who have a physical disability (Sarkees & Scott, 1985).
8. **Providing field trips and job site visits.** Scheduled field trips and job site visits can give all learners a realistic first-hand look into the real world of work. By "shadowing" workers in a particular occupational area, students can gain helpful insights into their own career decision. In addition, a field trip or job site visit can be very motivational in that the student can readily observe how his/her vocational training will be used in the world of work (Sarkees & Scott, 1985).
9. **Use of media.** Utilizing media can embellish instruction by: (a) assisting the teacher in presenting the proficiency or skill requirements for a specific job, (b) reinforcing concepts presented in a classroom, laboratory, or demonstration activity, (c) providing a vehicle for special needs learners to show what they have learned, (d) providing a valuable source of remedial assistance, (e) providing simulated learning experiences, (f) allowing special needs students to learn through their strongest style, and (g) adding variety to the instructional program. Examples of media include: computer assisted instruction (CAI), 16 mm films, film strips, flip charts, overhead transparencies, tape recorders, records, posters, magazines, and diagrams (Sarkees & Scott, 1985).
10. **Use of student-teacher contracts.** Student-teacher contracts can be excellent tools in helping learners with special needs achieve their vocational goals. The following guidelines should be used in developing and implementing a student-teacher contract: (a) decide on the task or project, (b) specifically state the requirements, (c) determine the minimum acceptable accuracy, (d) set a time limit—initially, short assignments and short time periods are usually best, (e) identify consequences, (f) discuss contract with student and support personnel, (g) have all parties sign the contract, (h) positive reinforcement should be given if the terms of the contract are satisfactorily met, (i) uncompleted contracts should be

analyzed by the teacher and student to determine the causes, and (j) develop new contracts cooperatively (Sarkees & Scott, 1985).

The following is a list of specific teaching strategies which educators can utilize when addressing the unique needs of handicapped students (Sarkees & Scott, 1985; Stern & Gathercoal, 1986; Tindall; 1980):

Important Note: It is very important to note that many of these teaching strategies could be used for all students. Appearing later in this Overview is a listing of instruction strategies which could be generic to all special needs students.

Instructing Students Who Are Mentally-Impaired

Involve as many different senses as possible in the learning process.

Use concrete specific terms rather than abstract terms. If necessary, have the student repeat the necessary information to you.

When giving written directions use lists instead of paragraphs. With regard to the student who can barely read, contact the remedial reading staff and arrange reading instruction. This instruction should focus on required reading for your course and that which is vital for employment.

Teach by demonstration (whenever possible). Don't hesitate to use hand-over-hand assistance in demonstrating how to use a tool or machine.

Allow time to practice machine or tool processes.

Break down complex operations into smaller tasks.

With regard to feedback, let the learner know what is wanted, and whether or not the student is achieving it. Give lots of positive reinforcement and encouragement. Nonverbal feedback is also helpful (i.e. touching the student or task, pointing, blocking or stopping an error as it is developing, and guiding the learner's movements). In addition, provide specific feedback with regard to the student's work. For example, the educator should say, "This piece was cut exactly to the right size," or "You put these two parts together correctly," or use Mark Gold's expression "Try another way" (Gold, 1975).

Build the student's confidence by: (a) utilizing activities that will assure success, (b) assigning special tasks which will communicate with the educator's confidence in the student, (c) giving students an opportunity to correct their work and hand in a good project or assignment, and (d) displaying the student's good work.

In helping students with their ability to make correct discriminations, utilize Gold's "match to sample" technique in which the student is provided an example and a number of choices. The student will choose the correct alternative based upon the characteristics of the sample (Gold & Scott, 1971).

With regard to helping the student make correct discriminations when there are minimal differences between the stimuli, it may be necessary to: (a) present the choices in an easy form at first, (b) exaggerate attributes, (c) make the choices gradually harder, or (d) add and fade out color cue, add and then gradually remove large cue differences, or combine these two approaches.

Retention/memory can be improved by: (a) being systematic and presenting one new piece of learning at a time, (b) relating new material to familiar material, and keeping it practical and concrete, and (c) utilizing training techniques such as the total task method, chaining, modeling/demonstrating, and the structured overview (see Tindalls' Puzzled About Educating Special Needs Students).

"Generalizing", or having the student apply what has been learned to the contexts, can be improved by: (a) using examples from different relevant contexts and (b) practicing in settings similar to or exactly like those that will be encountered on the job.

Instructing Students Who Are Hearing-Impaired

In private, discuss with the student his/her ability to communicate with you (lip/speech reading, use of hearing aid, writing, signing, and total communication). An open discussion with the student which demonstrates your concern as an educator is an excellent beginning in building rapport.

Body language communicates messages too. Remember not to give mixed messages with your body language. Also, be alert to the body message the student is giving you (i.e., is he/she communicating tension, nervousness, avoidance, or confusion?)

If you will be working with an interpreter, do not instruct the deaf student as if he/she were a third party. Speak directly to the student. Also, remember that the interpreter is ethically bound to interpret everything you say. Therefore, sensitive or other issues concerning the student is best addressed in a meeting before or after class. If you are using media where the room must be darkened, focus a small lamp on the interpreter.

Maintain good eye contact with the student while speaking.

Speak slowly and clearly, pronouncing each word, but without exaggerating or over pronouncing.

Do not stand in front of a window while speaking. The light should be shining on your face and not the student's.

Try to rephrase a thought rather than saying the same words over again.

Encourage the student to read ahead on class material.

Try to keep the noise level down as much as possible in the class/laboratory.

Utilize handouts, the chalkboard, and other media.

Install a light to indicate when dangerous machinery is on.

Instructing Students Who Are Speech-Impaired

Always maintain eye contact and nod your head while the student is talking. This will help the student build confidence.

Work cooperatively with speech therapist and/or communication specialist to determine which technique will help most in assisting these students to communicate more effectively.

Encourage peer tutoring and small group activities to help the speech-impaired student develop interpersonal relationships with the other students.

Always allow sufficient time for the student to complete his/her sentence.

Try not to act uncomfortable when these individuals are communicating with you (i.e., discontinuing eye contact, shifting your position, clearing your throat). Your discomfort can be very discouraging to the student.

Do not require these individuals to present oral reports until they feel comfortable in the classroom environment.

Model correct sentence structure for the speech-impaired student so he/she can follow your example.

Develop a list of technical terms used in your class and share these terms with the speech specialist to help the student become more confident in pronouncing terms used in class.

Instructing Students Who are Visually-Impaired

Orient the student to the classroom or laboratory before the course begins. Consistency and orderliness in the physical environment is very important to the visually-impaired student.

Arrange seating so the blind student will be able to hear the instruction and to allow for the best distance and lighting conditions for the partially sighted student.

Provide as many opportunities as possible for the visually impaired student to observe closely or to touch the materials.

Give materials and handouts to the student ahead of time. Also, a student peer can assist the visually-impaired student by making a carbon copy or a photocopy of their notes. Also, when possible, the educator can make a copy of their teaching notes. In this way, the visually-impaired student can review the materials with a tutor or have them transcribed into braille or taped.

It is important to gain and maintain the student's attention. Approval or disapproval will need to be verbalized.

Remember there is no need to talk louder to a visually-impaired student.

Rehabilitation counselors or special needs teachers can be useful resources in helping the student use commercial or modified learning aids or tools.

Tests may need to be prepared in large print, braille, on cassette tapes, or converted into exercises using the sense of touch. Also, it may be necessary to allow the student extra time to complete the test.

The tape recorder is the most frequently used technique for notetaking and preparing modified learning materials for the visually-impaired student.

The following is a sample of specially designed machines now available for the visually-impaired student: (a) OPTACON (Optical to Tactile Converter) allows students to read printed material, (b) STEREO-

TONER is similar to the OPTACON but converts the printed word into a tone pattern, (c) OPTOPHONE and VISOTACTOR convert print into sound, and (d) KURZWEL READING MACHINE which converts standard English text on a computer into easily comprehended speech.

A number of general tools or aids which can assist the student in reading or writing lessons for vocational courses follow: (a) braille, (b) large print, (c) tape recorders, (d) talking books, (e) raised letters, (f) slate and stylus (used to make notes), (g) braille writer (a 6-key manually operated machine), (h) typewriters, (i) braille verifier (types braille and regular copy simultaneously), and (j) signature guides.

Aids for mathematics and computer programming courses follow: (a) abacus design for the blind, (b) raised clock faces, (c) wire geometrical forms, (d) braille rulers, (e) raised-line checkbooks, (f) raised-line boards, (g) braille dominoes, (h) braille flash cards, (i) cubes with raised braille dots used for simple mathematical problems, (j) raised-line paper or graphs, (k) computer terminals that use braille printers, or those that type braille and conventional type simultaneously, and (l) talking calculators.

Aids used frequently in other vocational courses include: (a) braille maps, charts, diagrams, (b) self-threading needles, (c) wooden or cardboard models of specimens that other students see through microscopes, (d) braille micrometers and other shop tools that have special raised markings, (e) braille demo tapes to mark lab equipment and models, (f) light probes with audible sounds that check the operating status of machines, and (g) guides or templates to help students align objects properly.

Instructing Students Who Are Seriously Emotionally Disturbed

Consult with the student's parents, special education teacher, or counselor to determine whether any particular teaching techniques will help or hinder learning.

Try to understand the student. Disturbing behaviors are the outward sign of inner turmoil.

Go easy on bad days and avoid direct confrontations that would aggravate the situation.

Communicate acceptance to the student and a willingness to help him or her succeed in class.

Provide immediate feedback and reinforcement.

Establishing a rapport and trust with the student is important.

In the beginning of the semester, help the student gain confidence by giving him or her lessons in which success can be achieved in a series of small steps.

A measure of privacy when the student attempts a new task can ease his or her embarrassment at any awkwardness or ineptness.

Allow the student to correct mistakes prior to turning in an assignment or project to ease any pressure.

Help the student not to overreact to failure and praise him or her for continuing to try.

Cue appropriate behavior in a quiet, unemotional manner.

In resolving discipline problems: (a) do so in privacy, (b) focus on objective facts in a calm, supportive tone, (c) actively listen to the student, (d) after listening to the student, reflect on what has been said, by telling the student what you've heard, (e) ask the student if he or she has any ideas about solving the problem (encourage the student to be specific), and (f) conclude with a clear understanding of the changes, time-frame, and benefits which are expected.

In handling aggressive behavior: (a) try to remain calm and model the controlled behavior which you desire, (b) intervene by either separating the individuals involved and having them work on another activity or having them take a time-out in separate corners of the room, (c) if necessary, send an uninvolved student to the office to get help, either in talking to the students or in managing the class while the teacher talks to them, and (d) return to normal classroom procedure as quickly as possible.

Access professional colleagues in special education evaluation, counselling, or therapy when the student's behavior appears to be in need of additional attention.

Instructing Students Who Are Orthopedically-Impaired

In general, students with physical handicaps will be intellectually capable and able to participate in vocational programs.

Make the necessary modifications in classrooms, laboratories, equipment, building accessibility, and lavatories.

For notetaking the student can: (a) use a tape recorder, (b) have a classmate slip a carbon copy into his/her notebook to duplicate notes, and/or (c) have the instructor prepare an outline of the lecture.

For exams the instructor can: (a) give oral exams, (b) have the student dictate answers into a tape recorder or to another student, or (c) utilize a typewriter/computer if the student is able to type/keyboard.

Give the student more time to complete homework assignments. Also, giving the student advance notification of assignments is helpful.

In the laboratory, pair the student with one or more capable students in the class.

Enlarge copies of frequently used charts and diagrams posted near the student's desk eliminates the necessity of paging through a book.

Instructing Students Who Are Other Health-Impaired

Allow the students sufficient time for rest.

Seat the student in the most convenient place for easy access to necessary facilities (hall, lavatory, chalkboard, laboratory work stations).

Allow the students to work on program requirements at his or her own pace.

Tape lectures so the student can listen to them at home.

Work cooperatively with the health team in order to learn more about the student's special needs.

Utilize community resources personnel (social workers and itinerant teachers for home-bound students) for delivery of materials, assignments, and handouts.

Instructing Students Who Have Specific Learning Disabilities

Use visuals and demonstrations as often as possible.

Use concrete examples whenever possible.

Provide student with an outline of what will be covered in class.

Make sure all printed materials are clear and readable.

If the student has a visual perception problem, allow him or her to tape-record assignments.

Allow students to take tests orally or in a mode that compliments their performance.

Present new information in small amounts.

Make sure that writing assignments are relevant to the content of the program.

Allow students a longer period of time to complete assignments, if necessary.

List assignments in steps.

Task analysis can be used to lower the frustration level of these learners.

Programmed instruction materials can be very effective with these learners.

The following is a list of specific teaching strategies which can be very useful when working with students who have **limited English proficiency** (Sarkees & Scott, 1985):

Recognize the student's cultural background and allow for the student's individual differences.

Encourage these students to bring dictionaries to class.

Use demonstrations and hands-on experience as much as possible.

Speak slowly and use simple vocabulary and grammar.

Use bright felt tip markers to mark important words, passages, or illustrations.

If possible, use a translator for important concepts.

Work closely with LEP support personnel.

Keep homework assignments short.

Check for comprehension by asking the student what you have said.

Use simple sentences when writing test items so the student can concentrate on answering the question rather than deciphering it.

And finally, with regard to the disadvantaged population, typically these individuals dislike school, lack motivation, and have a low self-concept or esteem. Therefore, an educator's personal commitment and high expectations for the student may be two of the biggest single factors which will make a positive difference in this individual's life. Additionally, an educator's good example (i.e., being patient, understanding, well organized, and a good manager) can be extremely valuable in motivating and positively shaping the student's behavior (Baca, 1981). Vocational education can offer a great deal to the disadvantaged student in terms of teaching academic and social skills relative to the student's potential employment (Baca, 1981). The following are additional techniques or teaching strategies which can be very useful when working with disadvantaged students (Baca, 1981):

The educator should seek to understand the student's educational and social background through: (a) assessment information, (b) interaction with former teachers, (c) discussions with counselors, and (d) visits with parents to ascertain the student's social limitations and home situation.

Basic math, communication, and social skills should be reinforced. Math skills can be reinforced through hands-on learning activities. Communication skills can be improved by tactfully correcting poor grammar, when appropriate, and by providing resources that encourage reading in job related interests. Social skills such as getting along with people, grooming, proper dress, and respect for property and authority should be reinforced on a continual basis.

The importance of finishing school should be continually stressed. Relate acquisition of job skills to earn income.

Reinforce the student's feelings of self-worth by having high expectations for the student and by providing immediate reinforcement for work done well.

Simulate realistic job situations. All classroom and laboratory experiences should relate to employment in the occupation being studied.

Disadvantaged students (as all students) will typically react to the learning environment in a responsible and mature manner when they are treated with respect and as adults by the educator.

Classroom organization and discipline (being firm but not overbearing) are especially important. Generally, disadvantaged students want and need structure and discipline within their lives. Usually, these individuals will be responsive to and respect teachers who are firm, but sensitive.

Help the student develop employability and job coping skills (i.e., skills associated with finding, applying for, and retaining a job).

Help the student establish good work habits by keeping him or her involved with meaningful learning experiences. Each activity should have concrete learning objectives.

Disadvantaged students may need more encouragement to stay on task; however, they still should be required to complete all assignments (just as they will be required to do on the job).

Present instructions and information in clear, logical steps--building from the simple to the complex.

Technical terms should be communicated clearly and concisely and written in language which the students will understand.

Incorporate a variety of instructional methods in the curriculum (i.e., demonstrations, resource personnel, field trips, peer tutors, role playing, audio-visual aids, and on-site work experiences).

Present supplemental materials when appropriate. If such material is relevant to the acquisition of job skills, the student will not be humiliated by simplified material.

Highlight important parts of the student's text with a light marker to prevent the student from feeling overwhelmed with a larger volume of reading material.

Progress charts can be utilized to motivate disadvantaged students to master new skills.

Utilize flash cards (teacher made or commercial) to reinforce new terms and the use of tools and equipment.

When teaching special needs students, it is very important that instructors do not limit their instructional techniques. Therefore, the following abstract of instructional techniques or strategies has been prepared which could be considered generic to all special needs populations.

- Involve as many different senses as possible
- Use concrete terms
- Have students repeat important information
- Use lists rather than paragraphs for written directions
- Teach by demonstration
- Use hand-over-hand assistance when necessary
- Allow practice time
- Break complex operations into smaller tasks
- Provide immediate feedback
- Build confidence

- Help student make correct discriminations
- Help student with their retention/memory
- Help student generalize knowledge
- Build rapport
- Use appropriate body language
- Use appropriate techniques when working with an interpreter

- Maintain good eye contact
 - Speak slowly and clearly
 - Rephrase thoughts when necessary
 - Encourage the student to read ahead
 - Keep the noise level down
 - Utilize various forms of media
 - Use lights to indicate when dangerous machinery is on
 - Work cooperatively with therapists
 - Encourage peer tutoring
 - Try not to act uncomfortable around special needs students
 - Help students feel comfortable
 - Model correct sentence structure
 - Develop a list of technical terms for students and/or therapists
-
- Orient students before the course begins
 - Provide handouts ahead of time
 - Maintain student's attention
 - Use tape recorders for note taking
 - Try to understand the student
 - Communicate acceptance
 - Develop success experiences for the student
-
- Use appropriate behavioral management techniques
 - Facilitate the students with their notetaking
 - Facilitate the students with exams
-
- Pair students
 - Enlarge charts and diagrams
 - Use clear readable visuals frequently
 - Provide an outline of material which is being taught
-
- Writing assignments should be relevant
 - Use task analysis when necessary

- Allow for individual differences
- Encourage students to bring a dictionary
- Use felt tip marker to highlight important parts
- Do not make homework assignments too lengthy
- Use simple sentences when writing test items

- Reinforce basic education and work skills
- Reinforce the importance of finishing school
- Reinforce the student's feelings of self-worth

- Simulate realistic job situations
- Treat all students with respect and dignity
- Provide structure and organization
- Utilize progress charts
- Utilize flash cards

Remediation in the Basic Education Skills

It is very important to note that some students may need to acquire one or more basic education skills (i.e., mathematics, reading, writing, speaking, listening, interpersonal relations, and/or reasoning skills) to succeed in a vocational program. In addition, many employers will not hire an individual if he or she lacks these skills. Therefore, instruction in basic education skills may be necessary by the vocational educator. For information concerning basic or generalized skills instruction see Module 8.

Brown's 3-C Model

Brown's 3-C Model helps tie together many of the educational aspects discussed in this Overview. In general, Brown suggests that when delivering instruction to learners with special needs, the instructor can enhance the student's success rate and reduce feelings of frustration by considering the following 3-Cs of instruction: (a) correction, (b) compensation, and (c) circumvention (Brown & Dayser, 1982):

Correction. Providing feedback when the student's skills are being developed, thereby, correcting inappropriate behaviors immediately after they appear. Employing remedial reading and math services to enhance the student's ability to function within the program.

Compensation. Helping the student realize that each task represents only one of many activities contained in the course and that weaknesses in one area can often be offset by strengths in other areas. It should be communicated to the student that some tasks are inherently difficult and that he/she should not expect to achieve success immediately. Further efforts to compensate for the student would be to modify or adjust the delivery of instruction to extend over segments of several class periods. In addition, reinforcement during the early stages of instruction should be amply provided.

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Note: Basically, "compensation" involves the instructor's modifications to the curriculum, learning environment, and instruction which has been discussed in this Overview.

Circumvention. If the vocational program is way out of reach for a student, for example, due to a course requirement of a relatively high level of reading skill, it may become necessary for the student to "circumvent" this difficulty by discussing alternate training programs with a vocational counselor.

Summary

Modification of curriculum, learning environment, and instruction can be an important key to successful employment training for special needs students. It requires that the instructor know his/her content completely, but the benefits to all students will likely be extraordinary.

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COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

- (1) acceptance policies on student transfers from other school districts;
- (2) operation of school bus routes or runs on a non-segregated basis;
- (3) nondiscrimination in extracurricular activities and the use of school facilities;
- (4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;
- (5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;
- (6) nondiscriminatory practices relating to the use of a student's first language; and
- (7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964; EXECUTIVE ORDERS 11246 AND 11375; TITLE IX, 1973 EDUCATION AMENDMENTS; REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; AND VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulations by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs or activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.



APPLICATION FOR EMPLOYMENT

PERSONAL

RECORD OF EDUCATION

EMPLOYEE NAME
Janie Brown

DATE OF BIRTH
January 31, 1949

SEX
F

SSN
576-00-1189-20

OTHER
5781-57

YEAR TO DATE TOTALS

DATE	TIME
1:44	76.18
INC. TAX	1:59.21

OFFICE SUPPORT SYSTEMS

Simulations

Educational Development and Training Center
East Texas State University • Commerce, TX 75428

BEST COPY AVAILABLE

BO-307-SIM

OFFICE SUPPORT SYSTEMS SIMULATIONS

Prepared by
Jan Patton
Office Education Curriculum Specialist

Published by
Educational Development and Training Center
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in cooperation with
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PREFACE

The simulations for the *Office Support Systems Curriculum Guide* were prepared to provide quality instructional materials for instructors of office support systems courses in Texas.

These simulations have been developed through a joint effort of the Texas Education Agency and the Educational Development and Training Center located on the campus of East Texas State University at Commerce, Texas.

The purpose of developing these simulations is to provide office support systems instructors and students with realistic business activities that are coordinated with the *Office Support Systems Curriculum Guide*. Suggestions and comments concerning these simulations are requested to be sent to the curriculum specialist at the Educational Development and Training Center.

INSTRUCTIONS FOR USE OF SIMULATION MATERIALS

Two simulations have been prepared for each section of the *Office Support Systems Curriculum Guide* except for Sections I, III, and VI. A one-hour simulation has been prepared for those teaching office support systems as a one-semester course and a three-hour simulation has been prepared for those teaching office support systems as a full-year course. Each simulation is based on working at a specific company.

The simulations should be completed at the conclusion of each section of the guide. They may serve as a culminating test or as additional activities to tie in all of the concepts taught in the section.

The simulations may be performed on any type of microcomputer using the software packages of your choice. **It is assumed that the students already have a working knowledge of the software packages they will be working on.** You will need to decide what reference materials will be provided for the students to use.

Brief instructions and a grading sheet are provided for the teacher at the front of each simulation. Most answers are provided. Some simulations do not lend themselves to standard answers; therefore, the teacher must decide what grading standards to use. Clarifications are provided in the answers when necessary.

OFFICE SUPPORT SYSTEMS

SECTION I

**INTRODUCTION TO OFFICE
SUPPORT SYSTEMS**

NO SIMULATIONS

OFFICE SUPPORT SYSTEMS

SECTION II

KEYBOARDING

SIMULATIONS

INSTRUCTIONS

This is a simulation prepared for Section II, Units 1, 2, and 3 of the *Office Support Systems Curriculum Guide*. The simulation should be completed after the study of the reference materials in **Section II: Keyboarding**. Students should have studied and completed all written work for **Unit I--Information Processing Concepts**, **Unit II--Proofreading and Correcting Errors** and **Unit III--Keyboarding Applications**. The competency tests following these units should determine whether or not the students are ready for the hands-on simulation.

The simulation is divided into two sections. The one-hour simulation should be completed for a one-semester course. The three-hour simulation should be completed for a one-year course.

It is preferred that this simulation be performed on a microcomputer system. Your students will need access to a microcomputer, a blank disk for data storage, and a word processing software package of your choice. It is assumed that you have spent whatever time is needed to acquaint the students with both the computer and word processing software which they will use.

This simulation contains the following:

One-Hour Simulation

Key in the following:

- Memo
- Indwritten Report

Three-Hour Simulation

Key in the following:

- Memo
- Handwritten Report
- Semi-block Letter

- AMS Letter
- Full-block Letter
- Business Report

SPECIFIC INSTRUCTIONS

Please note that it is preferred that these activities be performed on a microcomputer. However, if you only have typewriters available, please instruct your students to make adjustments.

Also note that the placement of the student's documents on the paper may be different from those presented in the answers. Placing frames around the documents slightly distorts the correct placement on the page and the amount that may be placed on a page.

You may use the forms provided or have the students draw up their own.

ANSWERS

ESSEX CORPORATION

INTEROFFICE MEMO

TO: Ms. Jackie Smith, Mr. Jeff Block, Ms. Donna Caper, Ms. Diane Balay
FROM: Janice Elkins, Personnel Department
SUBJECT: Word Processing Workshop
DATE: October 1, 19__

This is to remind all department heads that the "Word Processing Workshop for Secretaries" will be held on Wednesday, October 10 and Thursday, October 11. Each session will begin at 6 p.m. and continue until 9 p.m. in room 219 of the training center.

The first session will cover the topics of correct procedures for writing and typing business letters and company memos. The October 11 session will cover the area of procedures for typing business reports. The trainer for this session will be Dr. Rebecca Warren, who is a training consultant from Garland County Community College in Hot Springs, Arkansas.

urs

COMMON LETTER STYLES

The three most common letter styles used in offices today are the full-blocked style, the semi-blocked letter style, and the AMS simplified style. Characteristics unique to each style are listed in the following paragraphs.

Common Letter Formats

The full-blocked style is one of the most popular letter formats because of its ease of use and speed of typing. In the full-blocked letter style, all parts begin flush with the left margin.

The semi-blocked letter style is basically the same as the full-blocked style. Some of the differences from the full-blocked style are:

1. Date line starts at the center of the line.
2. Complimentary closing starts at the center of the line.
3. Signature line starts at the center of the line.
4. Paragraphs may or may not be indented.

AMS simplified style is sponsored by the Administrative Management Society. The specific format characteristics include:

1. All lines start full-blocked on the right.
2. Inside address begins on the fourth space below the date.
3. No salutation is used in the AMS style letter.
4. Subject line in all capitals, a triple-space below the address.
5. Body of letter begins a triple-space below subject line.

Punctuation Styles

Punctuation styles depend on the author's and the company's preference. The following are two standard types:

Open punctuation saves time and is often used with the full-blocked letter style. In open punctuation, no punctuation is used after the salutation nor after the complimentary closing.

Mixed punctuation is considered the traditional letter punctuation style. Punctuation is used after both the salutation and the complimentary closing. A colon follows the formal salutation, a comma follows the informal salutation, and a comma follows the complimentary closing.

Other Letter Formats

Form letters are used for routine or large volume correspondence. Appropriate paragraphs are chosen from standardized copy and variable information is inserted. Many paragraphs may be stored in the word processor and may be merged to create letters. Some advantages of using form letters include:

1. Individualized, error-free letters produced.
2. Paragraphs are chosen from a standardized copy.
3. Variable information, such as salutations, are inserted.

Executive Correspondence

Executive correspondence includes personal and social business letters. Any letter style may be used. It is prepared on Monarch size or half-size stationery.

Official government correspondence is prepared in offices of the U.S. government. It uses 8 x 10-1/2 inch or 8-1/2 x 11 inch stationery. The inside address is keyed in at the left margin and four to six lines are left below the closing lines. Reference initials and other notations are omitted on the original copy and are included only on the file copy.

A two-page letter is used when there are at least two lines to be carried over to the second page. It includes a heading that is keyed 1 to 1-1/2 inches from the top edge of the page. The heading includes the first line of the inside address, page number, and date. A double space separates the heading and the body of the letter.

THIS ENDS THE ANSWERS FOR THE ONE-HOUR SIMULATION

ESSEX CORPORATION **RAM DIVISION**
1159 North Plaza, Hot Springs, AR 71913
(501)348-2398

October 1, 19__

Dr. Don Adams
Vice President for Personnel
Essex Corporation
2149 Foxbrook Drive
Memphis, TN 71999

Dear Dr. Adams:

I am writing to confirm that the Personnel Department here at the Hot Springs Ram Division has begun phase one of four training programs with the primary purpose of improving overall efficiency in our secretarial staff.

We have contacted Dr. Rebecca Warren, who is a business consultant with Garland County Community College in Hot Springs, Arkansas. Dr. Warren has outstanding credentials and has developed similar workshops for many national companies.

If possible, I believe you and I should get together and make plans for phase two of the program.

Sincerely yours,

Ms. Janice Elkins
Personnel Manager

urs

ESSEX CORPORATION **RAM DIVISION**
1159 North Plaza, Hot Springs, AR 71913
(501)348-2398

October 1, 19__

Dr. Rebecca Waren
Garland County Community College
One College Drive
Hot Springs, AR 71913

Dear Rebecca

I received your letter and copies of the program for the workshop. The program looks outstanding. There is a high level of excitement about the workshop in our secretarial staff. They really welcome the opportunity to increase their competency.

If there is anything that I need to do prior to the workshop, please let me know. Otherwise, all the details have been worked out and we are sitting on go.

Sincerely yours

Janice Elkins
Personnel Manager

urs

ESSEX CORPORATION

RAM DIVISION

**1159 North Plaza, Hot Springs, AR 71913
(501)348-2398**

October 1, 19__

Dr. Rebecca Waren
Garland County Community College
One College Drive
Hot Springs, AR 71913

Training Workshop

I received your letter and copies of the program for the workshop. The program looks outstanding. There is a high level of excitement about the workshop in our secretarial group. They really welcome the opportunity to increase their competency.

If there is anything that I need to do prior to the workshop, please let me know. Otherwise, all the details have been worked out and we are sitting on go.

Janice Elkins
Personnel Manager

urs

BUSINESS REPORTS

The purpose of a report is to give current information about a subject in a form that is easy to understand and useful to the person(s) receiving the report.

no Bold Characteristics of Business Reports 1

→ Formal business reports include: 1 #

1. Single spacing to save paper
2. Leftbound margins
3. Elite type
- 4. Summary, conclusion, and recommendation placed at beginning of report
5. Illustration, tables, and charts used to present information
6. Endnotes used in footnoting 1 #

no Bold Formatting a Business Report 1

→ Business report formatting includes: 1 #

1. Leftbound reports--use 1-1/2 inch left margin and a 1 inch right margin.
2. Unbound reports--use a 1 inch left margin and a 1 inch right margin.
3. Top margins--title is keyed in all caps and centered on line 13 leaving a 2 inch top margin. Begin all other pages on line 7 leaving a 1 inch top margin.
- 4. Bottom margins should be 1 inch on each page. 2 #
5. Page numbers of the introductory pages are typed with small Roman numerals. Consecutive Arabic numerals are used to number pages within the body of the report. Page numbers may be placed at right top margin, centered in the bottom margin, or centered in the top margin. 1 #

Headings in a business report are centered in all capital letters preceded by a triple-space and followed by a double-space. Spacing may be adapted to your word processing program.

Footnotes 1 and 2
Side headings are typed at the left margin with a *triple* space before and a double-space after the heading. They may be typed in all capitals, or in underlined uppercase and lowercase letters.

Paragraph heading are indented and underlined^d. Only the first word is capitalized. Place a period at the end of the heading and begin the paragraph. Leave a double space above the heading.
Parts of a Formal Business Report / #

the body of the business report is keyed in paragraph form with headings. Side headings are underlined and preceded by a triple space and followed by a double space. a formal business report is single spaced and consists of the following parts:

Introductory pages include^a Title page or cover sheet^{lc} which contains^a: a. title of report^b, b. name of person who prepared the report^c, c. name of person to whom report is to be distributed^d, date of distribution^{Pd}.

The title page should have a minimum of a 1-inch top and bottom margin, information should be centered vertically and horizontally on page, title should be keyed ~~IN~~^{all} capitals, and the remaining information should be keyed in uppercase and lowercase letters.

The table of contents contains a brief outline of the report contents and specific pages of information.

Paragraph headings should be indented 5 spaces and underlined followed by a period.

Footnotes in business reports use the endnote system. Place the name of the author and the page number of the quoted material in parentheses after the quote in the body of the report. Place the date of the publication between the author's name and page number if ~~two~~ or more publications by the same author are used. Supply complete publication information in a list of endnotes at the end of the paper³.

Standard formatting procedures for footnotes placed at the bottom of the page on which they are listed include the following rules. Use a 1-1/2 inch underscore to separate footnotes from the report body. Single space before the underscore, and double space after it. ~~No~~ each footnote to match those given in the text. Indent the first line of each footnote five spaces. Single space within footnotes, double space between footnotes. Leave 1-inch top and bottom margin on each page.

References/Bibliography section provides a complete listing of those materials that were used in preparation of the body of the report. The heading of a bibliography is centered^{two} 2 inches from the top of the paper. A triple space follows the heading. Single space within each entry and double space between entries. All entries should be in alphabetical order by author's surname and the second line and subsequent lines of each entry should be indented five spaces.

^ Footnote 3

→ BIBLIOGRAPHY ←

~~FOOTNOTES-REPORT FORMAT~~

① APA Publication Manual, (2^d ed., Washington, D.C.: American Psychological Association, 1974), p. 17⁵

← ② Joseph Gibaldi and Walter S. Achtert, MLA Handbook for Writers of Research Papers, Theses, and Dissertations, (New York: Modern Language Association, 1977), p. 24⁵

← ③ Catharine Seybold and Bruce Young, The Chicago Manual of Style (13th ed. Chicago: The University of Chicago Press, 1982), p. 51⁵

BUSINESS REPORTS

The purpose of a report is to give current information about a subject in a form that is easy to understand and useful to the person(s) receiving the report.

Characteristics of Business Reports

Formal business reports include:

1. Single spacing to save paper
2. Left-bound margins
3. Elite type
4. Summary, conclusion, and recommendation placed at beginning of report
5. Illustrations, tables, and charts used to present information
6. Endnotes used in footnoting¹

Formatting a Business Report

Business report formatting includes:

1. Leftbound reports--use 1-1/2 inch left margin and a 1 inch right margin.
2. Unbound reports--use a 1 inch left margin and a 1 inch right margin.
3. Top margins--title is keyed in all caps and centered on line 13 leaving a 2 inch top margin. Begin all other pages on line 7 leaving a 1 inch top margin.
4. Bottom margins should be 1 inch on each page.
5. Page numbers of the introductory pages are typed with small Roman numerals. Consecutive Arabic numerals are used to number pages within the body of the report. Page numbers may be placed at right top margin, centered in the bottom margin, or centered in the top margin.²

Headings in a business report are centered in all capital letters preceded by a triple-space and followed by a double-space. Spacing may be adapted to your word processing program.

¹APA Publication Manual, (2d ed., Washington, D.C.: American Psychological Association, 1974), p.17.

²Joseph Gibaldi and Walter S. Achtert, MLA Handbook for Writers of Research Papers, Theses, and Dissertations (New York: Modern Language Association, 1977), p.24.

Side headings are typed at the left margin with a triple-space before and a double-space after the heading. They may be typed in all capitals, or in underlined uppercase and lowercase letters.

Paragraph headings are indented and underlined. Only the first word is capitalized. Place a period at the end of the heading and begin the paragraph. Leave a double space above the heading.

Parts of a Formal Business Report

The body of the business report is keyed in paragraph form with headings. Side headings are underlined and preceded by a triple space and followed by a double space. A formal business report is single spaced and consists of the following parts:

Introductory pages include a title page or cover sheet containing:

- a. title of report,
- b. name of person who prepared the report,
- c. name of person to whom report is to be distributed, and
- d. date of distribution.

The title page should have a minimum of a 1-inch top and bottom margin, information should be centered vertically and horizontally on page, title should be keyed in all capitals, and the remaining information should be keyed in uppercase and lowercase letters.

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³Catharine Seybold and Bruce Young, The Chicago Manual of Style (13th ed. Chicago: The University of Chicago Press, 1982), p.51.

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BIBLIOGRAPHY

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Gibaldi, Joseph, and Walter S. Achtert. MLA Handbook for Writers of Research Papers, Theses, and Dissertations. New York: Modern Language Association, 1977.

Seybold, Catharine, and Bruce Young. The Chicago Manual of Style. 13th ed. Chicago: The University of Chicago Press, 1982.

OSS/Simulations/Section II
Evaluation Sheet

Name: _____

Grade: _____

Section: _____

Date: _____

KEYBOARDING SIMULATION EVALUATION SHEET

Received	Description
One-Hour Simulation	
_____	Memo
_____	Left-bound report
Comments:	

Received	Description
Grades	
One-Hour Simulation	
Memo	_____
Left-bound report	_____
Grade Average:	_____

Three-Hour Simulation	
_____	Memo
_____	Left-bound report
_____	Semi-blocked letter, mixed punctuation, indented paragraphs
_____	AMS simplified, open punctuation
_____	Full-blocked letter open punctuation
_____	Business reports
Comments:	

Grades	
Three-Hour Simulation	
Grade Average:	_____
Memo	_____
Left-bound report	_____
Semi-blocked letter	_____
AMS letter	_____
Full-blocked letter	_____
Business report	_____
Grade Average:	_____

ESSEX CORPORATION

Welcome to the ESSEX CORPORATION!

You are employed by the Essex Corporation as a clerk-typist in the Training Department.

Key in the following memo informing the department managers of the upcoming training workshop for office personnel in correct form. Proofread the memo carefully before turning it in to your supervisor for photocopying and distribution to the listed department managers.

Memo to the Essex Corporation department heads--Ms. Jackie Smith, Mr. Jeff Block, Ms. Donna Caper, Ms. Diane Balay

From--Janice Elkins, Personnel Department

Subject--Word Processing Workshop

Date--October 1, 19__

This is to remind all department heads that the "Word Processing Workshop for Secretaries" will be held on Wednesday, October 10 and Thursday, October 11. Each session will begin at 6 p.m. and continue until 9 p.m. in room 219 of the training center.

The first session will cover the topics of correct procedures for writing and typing business letters and company memos. The October 11 session will cover the area of procedures for typing business reports. The trainer for this session will be Dr. Rebecca Waren, who is a training consultant from Garland County Community College in Hot Springs, Arkansas.

urs

When you turn in the memo, your supervisor gives you this handwritten report on Common Letter Styles to key in correct left-bound business report format for distribution to workshop participants.

COMMON LETTER STYLES

The three most common letter styles used in offices today are the full-blocked style, the semi-blocked letter style, and the AMS simplified style. Characteristics unique to each style are listed in the following paragraphs.

Common Letter Formats

The full-blocked style is one of the most popular letter formats because of its ease of use and speed of typing. In the full-blocked letter style, all parts begin flush with the left margin.

The semi-blocked letter style is basically the same as the full-blocked style. Some of the differences from the full-blocked style are:

1. Date line starts at the center of the line.

2. Complimentary closing starts at the center of the line.
3. Signature line starts at the center of the line.
4. Paragraphs may or may not be indented.

AMS simplified style is sponsored by the Administrative Management Society. The specific format characteristics include:

1. All lines start full-blocked on the right.
2. Inside address begins on the fourth space below the date.
3. No salutation is used in the AMS style letter.
4. Subject line in all capitals, a triple-space below the address.
5. Body of letter begins a triple-space below subject line.

Punctuation Styles

Punctuation styles depend on the author's and the company's preference. The following are two standard types:

Open punctuation saves time and is often used with the full-blocked letter style. In open punctuation, no punctuation is used after the salutation nor after the complimentary closing.

Mixed punctuation is considered the traditional letter punctuation style. Punctuation is used after both the salutation and the complimentary closing. A colon follows the formal salutation, a comma follows the informal salutation, and a comma follows the complimentary closing.

Other Letter Formats

Form letters are used for routine or large volume correspondence. Appropriate paragraphs are chosen from standardized copy and variable information is inserted. Many paragraphs may be stored in the word processor and may be merged to create letters. Some advantages of using form letters include:

1. Individualized, error-free letters produced.
2. Paragraphs are chosen from a

standardized copy.

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A two-page letter is used when there are at least two lines to be carried over to the second page. It includes a heading that is keyed 1 to 1-1/2 inches from the top edge of the page. The heading includes the first line of the inside address, page number, and date. A double space separates the heading and the body of the letter.

STOP HERE IF YOU ARE COMPLETING THE ONE-HOUR SIMULATION

In addition to the documents you have just completed, a letter is needed for Dr. Don Adams. Key in the letter in semi-blocked style with indented paragraphs and mixed punctuation. Use October 1, 19__ date.

Letter to Dr. Don Adams, Vice President for Personnel, Essex Corporation,
2149 Foxbrook Drive, Memphis, Tennessee 71999.

Dear Dr. Adams: I am writing to confirm that the Personnel Department here at the Hot Springs Ram Division has begun phase one of the four training programs. The primary purpose of phase one is to improve the overall efficiency in our secretarial group.

We have contacted Dr. Rebecca Waren, who is a business consultant with Garland County Community College in Hot Springs, Arkansas. Dr. Waren has outstanding credentials and has developed similar workshops for many national companies.

If possible, I believe you and I should get together and make plans for phase two of the program. Please contact me at your earliest convenience as to when we can get together. Sincerely yours, Ms. Janice Elkins, Personnel Manager.

OSS/Simulations/Section II
Keyboarding Activities

Key in the letter to Dr. Waren, the training consultant, in full-block style with open punctuation using the AMS simplified style. Use October 1, 19__ date. Turn the document in to your supervisor.

Letter to Dr. Rebecca Waren, Garland County Community College, One College Drive, Hot Springs, AR 71913.

Dear Rebecca: I received your letter and copies of the program for the workshop. The program looks outstanding. There is a high level of excitement in our secretarial group. They are welcoming the opportunity to increase their competency.

If there is anything that I need to do prior to the workshop, please let me know. Otherwise, all the details have been worked out and we are ready to go. Sincerely yours, Janice Elkins, Personnel Manager.

Your supervisor has decided that the AMS style is not appropriate for this letter, reformat the letter to full-blocked style with open punctuation.

Next, the document "Business Reports" needs to be keyed in correct report form. This also will be distributed at the training workshop. Proofread and mark using correct proofreaders' symbols. Then key in the corrections. Turn in both copies to your supervisor.

BUSINESS REPORTS

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Characteristics of Business Reports

Formal business reports include:

1. Single spacing to save paper
2. Left bound margins
3. Elite type
4. Summary, conclusion, and recommendation placed at beginning of report
5. Illustration, tables, and charts used to present information
6. Endnotes used in footnoting(1)

Formatting a Business Report

Business report formatting includes:

1. Leftbound reports--use 1-1/2 inch left margin and a 1 inch right margin. 2. Unbound reports--use a 1 inch left margin and a 1 inch right margin.
3. Top margins--title is keyed in all caps and centered on line 13 leaving a 2 inch top margin. Begin all other pages on line 7 leaving a 1 inch top margin.
4. Bottom margins should be 1 inch on each page.
5. Page numbers of the introductory pages are typed with small Roman numerals. Consecutive Arabic numerals are used to number pages within the body of the report. Page numbers may be placed at right top margin, centered in the bottom margin, or centered in the top margin.(1)

Headings in a business report are centered in all capital letters preceeded by a triple-space and followed by a double-space. Spacing may be adapted to your word processing program.

Side headings are typed at the left margin with a 3-space before and a double-space after the heading. They may be typed in all capitals, or in underlined uppercase and lowercase letters.

Paragraph heading are indented and underline. Only the first word is capitalized. Place a period at the end of the heading and begin the paragraph. Leave a double space above the heading.

Parts of a Formal Business Report

the body of the business report is keyed in paragraph form with headings. Side headings are underlined and preceded by a triple space and followed by a double space. a formal business report is single spaced and consists of the following parts:

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Paragraph headings should be indented 5 spaces and underlined followed by a period

Footnotes in business reports use the end note system. Place the name of the author and the page number of the quoted material in parentheses after the quote in the body of the report. Place the date of the publication between the author's name and page number if two or more publications by the same author are used. Supply complete publication information in a list of endnotes at the end of the paper(3).

Standard formatting procedures for footnotes placed at the bottom of the page on which they are listed include the following rules. Use a 1-1/2 inch underscore to separate footnotes from the report body. Single space before the underscore, and double space after it. No. each footnote to match those given in the text. Indent the first line of each footnote five spaces. Single space within footnotes, double space between footnotes. Leave 1-inch top and bottom margin on each page.

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FOOTNOTES--REPORT FORMAT

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2.Joseph Gibaldi and Walter S. Achtert, MLA Handbook for Writers of Research Papers, Theses, and Dissertations (New York: Modern Language Association, 1977), p.24.

3.Catharine Seybold and Bruce Young, The Chicago Manual of Style (13th ed. Chicago: The University of Chicago Press, 1982), p.51.

ESSEX CORPORATION
INTEROFFICE MEMO

TO:

FROM:

SUBJECT:

DATE:

ESSEX CORPORATION

1159 North Plaza, Hot Springs, AR 71913
(501)348-2398

RAM DIVISION

OFFICE SUPPORT SYSTEMS

SECTION III

EMPLOYMENT

NO SIMULATIONS

213

OFFICE SUPPORT SYSTEMS

SECTION IV

FILING

SIMULATIONS

214

INSTRUCTIONS

This is a simulation prepared for Section IV, Units 1, 2, and 3 of the *Office Support Systems Curriculum Guide*. The simulation should be completed after the study of the reference materials in **Section IV: Filing**. Students should have studied and completed all written work for **Unit I--Alphabetic Filing**, **Unit II--Numerical Filing** and **Unit III--Other Filing Systems**. The competency tests following these units should determine whether or not the students are ready for the hands-on simulation.

The simulation is divided into two sections. The one-hour simulation should be completed for a one-semester course. The three-hour simulation should be completed for a one-year course.

The one-hour simulation will not require the use of any other equipment. However, the three-hour simulation can be performed on any microcomputer system. Your students will need access to a microcomputer, a blank disk for data storage, and a database software package of your choice. It is assumed that you have spent whatever time is needed to acquaint the students with both the computer and database software which they will use.

This simulation contains the following:

One-Hour Simulation

- Manual alphabetic filing activities.
- Manual numeric filing activities.
- Manual geographic filing activities

Three-Hour Simulation

- Design database
- Enter records
- Print Alphabetical listing
- Print Numerical listing
- Print Geographic listing

SPECIFIC SUGGESTIONS

One-hour simulation

1. Stress to the students the importance of making all of the corrections on the forms. If they do not have all the corrections made, it could throw their answers off.
2. Each part of the one-hour simulation may take longer than the allocated one-hour. You may wish to just have the students write down the numbers after each type of filing instead of keying them in.

Three-hour simulation

1. You may wish to do the one-hour simulation first and then do the three-hour simulation.
2. Use whatever software programs the students are familiar with.
3. The database exercises may not take the full two hours.
4. You may wish to suggest printouts of other database selections.

ANSWERS

Alphabetic Filing Order

5th Avenue Hair Design	18
Addison Foundation, The	54
B-17 Dude Ranch	5
Brother Michael	58
Bud Robert's Cafe	41
Carter & James, Inc.	19
Santos Cruz	57
D. E. Publishing Co.	13
Juan de la Garza, Mr.	49
Annette De Leon, Miss	24
Eileen D'Marco, Mrs.	59
\$ Value Supermarket	16
E Z Driving School	7
East-West Travels	43
El Grande Cleaners	50
Leon E. English, Bishop	22
Joan L. Evins, Avided	26
Joan L. Evins, Riverside	46
Father James	3
First American Thrift Co.	38
1st National Bank	31
Garcia & Sons Inc.	11
Robert G. Graham, Jr.	14
Robert G. Graham, Sr.	47
KWAR--Miami	17
Wong Fong Liu	28X
Harry P. MacMillian, Senator	44
Martin Mills Motel, The	25
Edward Jas. McMichael	20
Agnes Monroe, Miss	42
Molly Morgan, Miss	9
N. W. Travel Bureau	39
Walter M. Nathan II	12
Number 5 Skating Rink	53
#5 Sports Shop	48
Francis Patrick O'Connell	1
Robert O'Malley (Mrs.)	36
Francis O'Riley, Father	6
P A U	52
Plenty County Department of Education	56
G. P. Rodriguez	27
Guadalupe P. Rodriguez	45
William Saint Clare	4
Juan Saldana	60
San Luis County Library	37
Cruz Santos	57X

OSS/Simulations/Section IV
Filing Answers

Paul E. Smith	10
Jos. N. South, Dr.	2
South East Inc.	8
Mary Speers, Professor	40
Marilyn Swazy, D.D.S	21
T U B Distributors	30
Texas State Department of Land Management	35
Texas State Department of Recreation	55
United Motor Company	29
U. S. Government Department of State	32
University of Maine	51
Walters Bros. Grocery	53
Geo. Wellington, Mr.	15
Marian Wilson-Reed	34
Fong Liu Wong	28
Robt. M. Yantze, Ph.D.	23

OSS/Simulations/Section IV
Filing Answers

Policy No.
42-27375660-1

Policy Holder
Francis Patrick ~~O'Conner~~ *O'Connell*

Street Address
5686 Winding Street

City, State, Zip
San Francisco, CA 90411-2378

Telephone No.
(415) 876-9345

Name of Primary Beneficiary
Janice ~~O'Conner~~ *O'Connell*

Street Address
5686 Winding Street

City, State, Zip
San Francisco, CA 90411-2378

Policy No.
37-97843990-11

Policy Holder
Garcia & Sons Inc.

Street Address
~~5814 Elvira~~
4515 Elvira Lane

City, State, Zip
Centerfield, NY 12720-2313

Telephone No.
(716) 052-5655

Name of Primary Beneficiary
Jose Garcia

Street Address
1835 South 5th

City, State, Zip
Centerfield, NY 12720-2313

Policy No. *27315560*
42-37251506-7

Policy Holder
E Z Driving School

Street Address
15 Riding Avenue

City, State, Zip
San Jose, CA 90404-2436

Telephone No.
(408) 443-6673

Name of Primary Beneficiary
Joseph Tarpley

Street Address
Route 1, Box 268

City, State, Zip
San Jose, CA 90408-2475

Policy No.
37-97849302-6
~~37-91844302-8~~

Policy Holder
Father Francis O'Riley

Street Address
4 Haven Street

City, State, Zip
Manchester, NH 23104-7764

Telephone No.
(603) 752-4275

Name of Primary Beneficiary
Jonas O'Riley

Street Address
100 Briarwood

City, State, Zip
Commerce, TX 75428-5643

Policy No.
37-97849320-2

Policy Holder
Dr. Jos. N. South

Street Address
~~954 854~~ Clay Boulevard

City, State, Zip
12207-2371
Albany, NY ~~21702-7312~~

Telephone No.
(518) 886-4754

Name of Primary Beneficiary
Jessie South

Street Address
954 Clay Boulevard

City, State, Zip
Albany, NY ~~21702-7312~~ *12207-2371*

Policy No.
42-27275819-12

Policy Holder
Walter M. Nathan II

Street Address
Pluma
1616 La ~~Palma~~ Drive

City, State, Zip
Anaheim, CA 90920-6643

Telephone No.
(714) 234-4737

Name of Primary Beneficiary
Stephanie Reichel

Street Address
Pluma
1616 La ~~Palma~~ Drive

City, State, Zip
Anaheim, CA 90920-6643

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Policy No. 37-95783812-3 Policy Holder Father James Street Address 5668 ~~Springtown~~ ^{Springton} Road City, State, Zip Allentown, PA 18104-7256 Telephone No. (514) 567-9356 Name of Primary Beneficiary ~~Springtown~~ ^{Springton} Parish Street Address 5660 ~~Springtown~~ ^{Springton} Road City, State, Zip Allentown, PA 18104-7256	Policy No. 42-27351450-8 Policy Holder South East Inc. Street Address 7893 Hot Springs Ave. City, State, Zip Los Angeles, CA ~~94047-6473~~ ⁹⁰⁴⁷⁴⁻⁷⁶⁴³ Telephone No. (213) 225-6543 Name of Primary Beneficiary John Hawkins Street Address 4789 Hot Springs Ave. City, State, Zip Los Angeles, CA ~~94047-6473~~ ⁹⁰⁴⁷⁴⁻⁷⁶⁴³
Policy No. 08-67581517-13 Policy Holder D. E. Publishing Co. Street Address P. O. Box 687 City, State, Zip MI Fowler, ME 48835-3427 Telephone No. (313) 074-4790 Name of Primary Beneficiary Richard Evans Street Address 1211 West 10th City, State, Zip MI Fowler, ME 48835-3422	Policy No. 42-27354105-4 Policy Holder William ~~St. Clair~~ Saint Clare Street Address 2401 Maddox Drive City, State, Zip Bend, OR 87701-3167 Telephone No. (503) 408-6882 Name of Primary Beneficiary Alfred Jones Street Address 3630 Arapaho City, State, Zip Mesa, AZ 45622-0145
Policy No. 19-75286438-9 Policy Holder Miss Molly Morgan Street Address 6789 ~~East Fern Ave.~~ Eastern Avenue City, State, Zip Hayward, WI 64834-4521 Telephone No. (414) 568-6636 Name of Primary Beneficiary Jessica Fletcher Street Address 203 Morse Avenue City, State, Zip Hayward, WI 64834-4521	Policy No. 37-97234980-14 Policy Holder Robert G. Graham, Jr. Street Address 315 Beverly Drive City, State, Zip Dartmouth ~~Darthmont~~, MD 02785-3326 Telephone No. (617) 967-8905 Name of Primary Beneficiary Jennifer R. Graham Street Address 315 Beverly Drive City, State, Zip Dartmouth ~~Darthmont~~, MD 02785-3326

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Policy No. 86372981-5
48-76728318-50

Policy Holder

B-17 Dude Ranch

Street Address

Middletown Highway

City, State, Zip

Vancouver, WA 43661-0943

Telephone No.

(206) 809-5534

Name of Primary Beneficiary

John Jefferies

Street Address

Middletown Highway

City, State, Zip

Vancouver, WA 43661-0943

Policy No.

08-67581537-10

Policy Holder

Paul E. Smith

Street Address

16 Evelyn Eve Lane

City, State, Zip

Cleveland, OH 44108-5648

Telephone No.

(216) 442-5332

Name of Primary Beneficiary

Eva P. Smith

Street Address

16 Evelyn Eve Lane

City, State, Zip

Cleveland, OH 44108-5648

Policy No.

42-27251837-15

Policy Holder

Mr. Geo. Wellington

Street Address

2005
5002 Technology Drive

City, State, Zip

Sunnyside, AZ 36980-2458

Telephone No.

(209) 997-3357

Name of Primary Beneficiary

Pattie Wellington

Street Address

2005
5002 Technology Drive

City, State, Zip

Sunnyside, AZ 36980-2458

Policy No.

37-97842903-16

Policy Holder

\$ Value Supermarket

Street Address

9460 Elm Street

City, State, Zip

14408-7845
Darrington, NY 41108-4578

Telephone No.

(914) 647-7428

Name of Primary Beneficiary

Tony Sheer

Street Address

5623 North Jones

City, State, Zip

MS
Jacksonville, MA 69832-2215

Policy No.

42-27315606-21

Policy Holder

Marilyn
Patrick G. Swazye, D.O.S.

Street Address

345 Winnona Drive

City, State, Zip

San Diego, CA 90494-7438

Telephone No.

(619) 627-5245

Name of Primary Beneficiary

Patrick G.
Marilyn Swazye, D.O.S.

Street Address

345 Winnona Drive

City, State, Zip

San Diego, CA 90494-7438

Policy No.

08-67581571-26

Policy Holder

Joan L. Evans Evins

Street Address

4563 South Elm Street

City, State, Zip

Avided, OH 31404-2834

Telephone No.

(216) 557-5244

Name of Primary Beneficiary

Richard J. Evans Evins

Street Address

4563 South Elm Street

City, State, Zip

Avided, OH 31404-2834

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Policy No.
13-45828770-17

Policy Holder *KWAR*
~~WKAR~~ - Miami

Street Address
8731 Van Dyke Road

City, State, Zip
Jacksonville, MS 69832-2217

Telephone No.
(601) 321-5658

Name of Primary Beneficiary
Davy Jones

Street Address
3721 Carson Road

City, State, Zip
Anaheim, CA 92001-1342

Policy No.
19-75248683-22

Policy Holder
Bishop Leon E. English

Street Address *Broadmore*
4300 ~~Broadway~~ Street

City, State, Zip
Denver, CO 22308-4437

Telephone No.
(303) 686-6249

Name of Primary Beneficiary
St. Michael's Church

Street Address *Broadmore*
4390 ~~Broadway~~ Street

City, State, Zip
Denver, CO 22308-4437

Policy No. *86372818-27*
~~48-86723188-72~~

Policy Holder
G. P. Rodriguez

Street Address
92 Martindale Drive

City, State, Zip
Cedarlane, WA 43012-0023

Telephone No.
(509) 575-4245

Name of Primary Beneficiary
Marissa Rodriguez

Street Address
92 Martindale Drive

City, State, Zip
Cedarlane, WA 43012-0023

Policy No.
19-75284881-18

Policy Holder
5th Avenue Hair Design

Street Address
231 5th Avenue

City, State, Zip *MN*
Cambridge, ~~MA~~ 55132-6325

Telephone No.
(218) 329-6849

Name of Primary Beneficiary
Frances Robinson

Street Address
4514 Blaisdell Avenue

City, State, Zip *MN*
Minneapolis, ~~MA~~ 55431-6345

Policy No.
19-75284683-23

Policy Holder *Robt. M. Yantze*
~~Robert N. Yantze~~, Ph.D.

Street Address
698 Hurricane Lane

City, State, Zip
Minneapolis, MN 55431-6315

Telephone No.
(612) 668-8412

Name of Primary Beneficiary
Dorothy Yantze ~~Yatze~~ Yantze

Street Address
698 Hurricane Lane

City, State, Zip
Minneapolis, MN 55431-6315

Policy No.
13-45826780-28

Policy Holder *Liu*
Fong ~~Hai~~ Wong

Street Address *Lilly*
732 ~~Lilly~~ Lane

City, State, Zip
Santa Maria, FL 34089-5573

Telephone No.
(813) 682-5431

Name of Primary Beneficiary
Joseph Fong Wong

Street Address *Lilly*
732 ~~Lilly~~ Lane

City, State, Zip
Santa Maria, FL 34089-5573

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Policy No.
42-27251783-19

Policy Holder
Carter & James, Inc.

Street Address *Homa*
900 ~~Loma~~ Linda Drive

City, State, Zip
Oceanside, CA 90049-2378

Telephone No.
(714) 563-7564

Name of Primary Beneficiary
Carolyn Carter-James

Street Address
104 Royal Lane

City, State, Zip *2156*
Greenville, TX 75401-~~5612~~

Policy No.
48-86372988-29

Policy Holder
United Motor Company

Street Address *21300*
~~20031~~ College Park Dr.

City, State, Zip
Peoria, WA 43873-8823

Telephone No.
(509) 273-6884

Name of Primary Beneficiary
Karl Draheim

Street Address *3822*
~~2203~~ Apean Way

City, State, Zip
Peoria, WA 43873-8823

Policy No.
37-97329408-25

Policy Holder
The Martin Mills Motel

Street Address *89th*
2345 ~~80th~~ Street

City, State, Zip
New York, NY 10034-4523

Telephone No.
(212) 255-7718

Name of Primary Beneficiary
Matthew Martin

Street Address *89th*
2345 ~~80th~~ Street

City, State, Zip
New York, NY 10034-4523

Policy No.
13-45828760-24

Policy Holder
Miss Annette ~~deLeon~~ De Leon

Street Address
865 North Bridge St.

City, State, Zip
Gayland, FL 53794-7523

Telephone No.
(904) 755-2310

Name of Primary Beneficiary
Buddy ~~deLeon~~ De Leon

Street Address
8339 Ewing Road

City, State, Zip
Minneapolis, MN 55431-7523

Policy No.
~~80-67518591-02~~ *08-67581519-20*

Policy Holder
Edward Jas. McMichael

Street Address
546798 Martin Parkway

City, State, Zip
Avided, OH 31044-3425

Telephone No.
(216) 648-9551

Name of Primary Beneficiary
Suzanne McMichael

Street Address
546798 Martin Parkway

City, State, Zip
Avided, OH 31044-3425

Policy No.
48-86372801-30

Policy Holder
~~Tub Distributions~~ TUB Distributors

Street Address
553 Merle Place

City, State, Zip
Tacoma, WA 43303-3586

Telephone No.
(206) 723-6830

Name of Primary Beneficiary
Teresa "Tess" Wilton

Street Address
4253 Pearl

City, State, Zip
Tacoma, WA 43303-3566

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Policy No. 02-22841881-31 Policy Holder 1st National Bank Street Address 145 Hibiscus Drive City, State, Zip ~~Monrovia~~ Monrovia, LA 34216-2632 Telephone No. (318) 148-2220 Name of Primary Beneficiary Alfred Johnson Estate Street Address 550 West Waco City, State, Zip Lafayette, LA ~~34216-2632~~ 34428-2551	Policy No. 02-22842771-36 Policy Holder Mrs. Robert O'Malley Street Address 954 Luellen Avenue City, State, Zip Friendship, TX 75890-3652 Telephone No. ~~(214)~~ 842-3622 (409) 248-2236 Name of Primary Beneficiary Robert O'Malley Street Address 954 Luellen Avenue City, State, Zip Friendship, TX 75890-3652
Policy No. ~~20-22481212-41~~ 02-22842112-41 Policy Holder Bud Robert's Cafe Street Address 843 Lowtide Drive City, State, Zip Corpus Christi, TX 75456-2241 Telephone No. (512) 142-2221 Name of Primary Beneficiary Bud Robert Street Address 860 Lowtide Terrace City, State, Zip Corpus Christi, TX 75456-2241	Policy No. 00-11527463-32 Policy Holder U.S. Government Department of Street Address State 4000 Mayday Drive City, State, Zip Washington, DC ~~30952-4500~~ 39025-0045 Telephone No. (202) 295-1100 Name of Primary Beneficiary Edwards Foundation Street Address 300 Avenue of the Americas City, State, Zip Washington, DC ~~30952-5100~~ 39025-0015
Policy No. 00-11527824-37 Policy Holder ~~San Luis County~~ St. Louis Co. Library Street Address 8321 River Drive City, State, Zip San Luis, TX 73478-5234 Telephone No. (915) 228-7341 Name of Primary Beneficiary ~~San Luis County~~ St. Louis Co. Antiques Street Address 1400 West Cado City, State, Zip San Luis, TX 73478-5234	Policy No. 37-97234890-42 Policy Holder Miss Agnes Monroe Street Address 8009 Ford Lane City, State, Zip Pittsville, NY 13091-3451 Telephone No. 716 ~~(617)~~ 899-2348 Name of Primary Beneficiary Clare Legree Street Address 3072 Park Street City, State, Zip Pittsville, NY 13091-3451

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Filing Answers

Policy No.

08-67585779-33

Policy Holder

Walters Bros. ~~Company~~ Grocery

Street Address

Whittington
4633 Whittingham St.

City, State, Zip

Broadmore, MI 55551-4030

Telephone No.

(616) 525-7680

Name of Primary Beneficiary

George J. Walters

Street Address

4721 Westwood

City, State, Zip

Broadmore, MI 55551-4033

Policy No.

37-95783182-38

Policy Holder

~~First~~ American Thrift Co.

Street Address

764 Abrigail Blvd.

City, State, Zip

Long Creek, NY 13478-7597

Telephone No.

(917) 832-8138

Name of Primary Beneficiary

Jefferson Estate

Street Address

1600 Big Apple Road

City, State, Zip

Mount Vernon, NY 14378-7597

Policy No.

37-97843099-43

Policy Holder

~~East-West~~
East and West Travels

Street Address

45000 Exotic Street

City, State, Zip

Itaska, NH 21456-9065

Telephone No.

(603) 483-4399

Name of Primary Beneficiary

Gillian Border

Street Address

123 Alpha Street

City, State, Zip

Itaska, NH 21456-9065

Policy No.

48-86382718-34

Policy Holder

Marian Wilson-Reed

Street Address

6894 Duel Drive

City, State, Zip

~~4330~~
Tacoma, WA ~~40330~~-3566

Telephone No.

(206) 178-2368

Name of Primary Beneficiary

Orwin Wilson-Reed

Street Address

6894 Duel Drive

City, State, Zip

~~4330~~
Tacoma, WA ~~40330~~-3566

Policy No.

02-22841181-39

Policy Holder

N. W. Travel Bureau

Street Address

Founders
123 Flounders Road

City, State, Zip

Padre Island, TX 78793-3221

Telephone No.

(512) 118-1482

Name of Primary Beneficiary

James Rowe

Street Address

8932 Sand Pebble

City, State, Zip

Padre Island, TX 78793-3221

Policy No.

~~05-73289815-54~~ 50-73829851-45

Policy Holder

Guadalupe P. Rodriguez

Street Address

346 Aloha Road

City, State, Zip

Honolulu, HI 99949-2113

Telephone No.

(808) 372-2841

Name of Primary Beneficiary

Maria Martinez Rodriguez

Street Address

346 Aloha Drive

City, State, Zip

Honolulu, HI 99949-2113

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Filing Answers

Policy No. 37-97329084-44 Policy Holder Sen. Harry P. MacMillian Street Address ~~132321~~ J ⁹ Street City, State, Zip Dover, DE 03456-1080 Telephone No. (302) 913-4804 Name of Primary Beneficiary Josephine P. MacMillian Street Address ~~132321~~ J ⁹ Street City, State, Zip Dover, DE 03456-1080	Policy No. 00-11527753-35 Policy Holder Texas State Dept. of Land Street Address ~~Delft~~ Management 2134 ~~Delft~~ Drive City, State, Zip Austin, TX 74532-3267 Telephone No. (512) 863-2871 Name of Primary Beneficiary Field and Stream Collection Street Address 1500 North North Congress City, State, Zip Austin, TX 54532-3267
Policy No. 48-86372889-40 Policy Holder Professor Mary Speers Street Address ~~Schoolhouse~~ 4200 ~~School House~~ Dr. City, State, Zip Merrymack, WA 43935-5636 Telephone No. (206) 409-8872 Name of Primary Beneficiary Paul A. Speers Street Address ~~Schoolhouse~~ 4200 ~~School House~~ Dr. City, State, Zip Merrymack, WA 43935-5636	Policy No. 37-97843800-46 Policy Holder Joan L. Evins Street Address ~~Morgandale~~ 5578 ~~Morningdale~~ Blvd. City, State, Zip Riverdale, NY 10893-4763 Telephone No. (716) 843-4883 Name of Primary Beneficiary Marty ^R Evins Street Address ~~Morgandale~~ 5578 ~~Morningdale~~ Blvd. City, State, Zip Riverdale, NY 10893-4763
Policy No. 37-97849230-51 Policy Holder University of Maine Street Address 1432 Mainland Drive City, State, Zip ~~ME~~ Augusta, ~~MA~~ 86350-0563 Telephone No. (207) 492-5130 Name of Primary Beneficiary ARA Document Collection Street Address 3200 State Street City, State, Zip Philadelphia, PA 65974-2145	Policy No. 08-67585179-56 Policy Holder Plenty County Dept. of Education Street Address 5503 Seville Avenue City, State, Zip ~~MI~~ Morningstown, ~~ME~~ 34678-2413 Telephone No. (313) 994-8156 Name of Primary Beneficiary Morningstown High School Street Address 600 South Culver City, State, Zip ~~MI~~ Morningstown, ~~ME~~ 34678-2413

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Policy No. 42-27354400-47 Policy Holder Robert G. Graham, Sr. Street Address 5678 River Road City, State, Zip Oakville, OR 87765-2313 Telephone No. (503) 676-7850 Name of Primary Beneficiary Robert G. Graham, Jr. Street Address 7425 West 105th St. City, State, Zip ~~Bloomington, MN~~ Birmingham, MS 55421-4327	Policy No. 42-27275891-52 Policy Holder P A U Street Address 4444 Englewood Road City, State, Zip ~~Potstown~~ Potsdown, OR 87938-3343 Telephone No. (503) 468-8582 Name of Primary Beneficiary Ronald McCaslin Street Address 3025 St. Paul Avenue City, State, Zip ~~Potstown~~ Potsdown, OR 87938-3343
Policy No. 02-22847712-57 Policy Holder ~~Santos~~ Santas Cruz Street Address 356 East 12th City, State, Zip Elsa, TX 73145-3776 Telephone No. ~~512~~ (817) 689-1183 Name of Primary Beneficiary George Cruz Street Address 1923 Casa Linda Way City, State, Zip San Juan, TX 71254-3529	Policy No. 19-75286483-48 Policy Holder ~~#5~~ No. 9 Sports Shop Street Address 95432 Hillside Dr. City, State, Zip Maysville, SD 56432-7754 Telephone No. (605) 286-8449 Name of Primary Beneficiary Mary May Street Address 1415 May Terrace City, State, Zip Maysville, SD 56432-7754
Policy No. 02-22848181-53 Policy Holder Number 5 Skating Rink Street Address 3478 Rinkland Road City, State, Zip Topeka, KS 68938-9953 Telephone No. (913) 633-4568 Name of Primary Beneficiary Bill Belton Beltron Street Address 7916 Johnson Street City, State, Zip Emporia, KS 68401-3342	Policy No. 48-86382748-58 Policy Holder Brother Michael Street Address ~~Rider~~ 5640 Rapture Road City, State, Zip Spokane, WA 43205-4838 Telephone No. (509) 994-2849 Name of Primary Beneficiary Church of the Latter Day Saints Street Address 50 Glory Road City, State, Zip Goergeland, GA 95388-3526

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Policy No.

48-86382780-49

Policy Holder

Mr. Juan de la Garza

Street Address

~~Dail~~
4589 Rail Terrace

City, State, Zip

Montealto, NV 83567-0954

Telephone No.

(702) 863-4918

Name of Primary Beneficiary

Alecia Juarez de la Garza

Street Address

~~Dail~~
4589 Rail Terrace

City, State, Zip

Montealto, NV 83567-0954

Policy No.

13-45828706-54

Policy Holder

The Addison Foundation

Street Address

~~Eduardo~~
321 Eduardo Drive

City, State, Zip

~~Springland~~
Springfield, GA 93578-5764

Telephone No.

(912) 846-2286

Name of Primary Beneficiary

~~Cassandra~~
Cassandra Addison

Street Address

8534 Lansing Road

City, State, Zip

~~Springland~~
Springfield, GA 93578-5764

Policy No.

48-86372898-59

Policy Holder

Mrs. Eileen ~~Demaree~~ D'Marco

Street Address

4545 Redvale Drive

City, State, Zip

Rivermont, MT 34568-6342

Telephone No.

(406) 913-5583

Name of Primary Beneficiary

~~Henry Demaree~~ Henrico D'Marco

Street Address

109 Valley View Lane

City, State, Zip

Liverpool, IA 70201-4256

Policy No.

13-45827801-50

Policy Holder

~~E/~~
Rio Grande Cleaners

Street Address

82346 Holiday Road

City, State, Zip

Smithlane, MS 64680-4442

Telephone No.

(601) 268-5246

Name of Primary Beneficiary

Jack Anderson

Street Address

3925 5th Avenue

City, State, Zip

Smithlane, MS 64680-4442

Policy No.

~~00-52117572-45~~ 00-11527572-55

Policy Holder

Texas State Dept. of Recreation

Street Address

3127 Hardrock Boulevard

City, State, Zip

Houston, TX 79887-8856

Telephone No.

(713) 468-8822

Name of Primary Beneficiary

Jason Foundation

Street Address

8930 Chimney Rock Road

City, State, Zip

Houston, TX 79872-8865

Policy No.

37-97843891-60

Policy Holder

Juan Saldana

Street Address

~~Valleyview~~
4323 Valley Road

City, State, Zip

Longmount, VA 34589-3457

Telephone No.

(703) 318-9463

Name of Primary Beneficiary

Jon Jeffries

Street Address

130 West ~~15th~~ 50th

City, State, Zip

Houston, TX 79871-3457

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Washington:	G. P. Rodriguez	Cedarlane	27
	Mary Speers, Professor	Merrymack	40
	United Motor Company	Peoria	29
	Brother Michael	Spokane	58
	T U B Distributors	Tacoma	30
	Marian Wilson-Reed	Tacoma	34
	B-17 Dude Ranch	Vancouver	5

So. Central Region

Kansas:	Number 5 Skating Rink	Topeka	53
Louisiana:	1st National Bank	Monravia	31
Texas:	Bud Robert's Cafe	Corpus Christi	41
	Santos Cruz	Elsa	57
	Robert O'Malley (Mrs.)	Friendship	36
	N. W. Travel Bureau	Padre Island	39

Southeast Region

Florida:	Annette De Leon, Miss	Gayland	24
	Fong Liu Wong	Santa Maria	28
Georgia:	Addison Foundation, The	Springland	54
Mississippi:	KWAR-Miami	Jacksonville	17
	El Grande Cleaners	Smithlanc	50

OSS/Simulations/Section IV
Filing Answers

Southwest Region

Arizona:	Geo. Wellington, Mr.	Sunnyside	15
California:	Walter M. Nathan II	Anaheim	12
	South East Inc.	Los Angeles	8
	Carter & James, Inc.	Oceanside	19
	Marilyn Swazye, D.D.S.	San Diego	21
	Francis Patrick O'Connell	San Francisco	1
	E Z Driving School	San Jose	7
Oregon:	P A U	Bend	4
	Robert G. Graham, Sr.	Oakville	47
	William Saint Clare	Potstown	52

Other Region

Hawaii:	Gudalupe P. Rodriguez	Honolulu	54
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Alphanumeric Filing Order

Policyholder's Name

Street Address

City, State, ZIP

5th Avenue Hair Design	231 5th Avenue	Cambridge, MN 55132-6325	18
Addison Foundation, The	321 Eduardo Drive	Springland, GA 93578-5764	54
B-17 Dude Ranch	Middletown Highway	Vancouver, WA 43661-0943	5
Brother Michael	5640 Rider Road	Spokane, WA 43205-4838	58
Bud Robert's Cafe	843 Lowtide Drive	Corpus Christi, TX 75456-2241	41
Carter & James, Inc.	900 Homa Linda Drive	Oceanside, CA 90049-2378	19
Santos Cruz	356 East 12th	Elsa, TX 73145-3776	57
D. E. Publishing Co.	P. O. Box 687	Fowler, MI 48835-3427	13
Juan de la Garza, Mr.	4589 Dail Terrace	Montealto, NV 83567-0954	49
Annette De Leon, Miss	865 North Bridge St.	Gayland, FL 53794-7523	24
Eileen D'Marco, Mrs.	4545 Redvale Drive	Rivermont, MT 34568-6342	59
\$ Value Supermarket	9460 Elm Street	Darrington, NY 14408-7845	16
E Z Driving School	15 Riding Avenue	San Jose, CA 90404-2436	7
East-West Travels	45000 Exotic Street	Itaska, NH 21456-9065	43
El Grande Cleaners	82346 Holiday Road	Smithland, MS 64680-4442	50
Leon E. English, Bishop	4300 Broadmore Street	Denver, CO 22308-4437	22
Joan L. Evins, Avided	4563 South Elm Street	Avided, OH 31404-2834	26
Joan L. Evins, Riverdale	5578 Morgandale Blvd.	Riverdale, NY 10893-4763	46
Father James	5668 Springton Road	Allentown, PA 18104-7256	3
First American Thrift Co.	764 Abridgail Blvd.	Long Creek, NY 13478-7597	38
1st National Bank	145 Hibiscus Drive	Monrovia, LA 34216-2632	31
Garcia & Sons Inc.	5514 Elvira Lane	Centerfield, NY 12720-2313	11
Robert G. Graham, Jr.	315 Beverly Drive	Dartmouth, MD 02785-3326	14
Robert G. Graham, Sr.	5678 River Road	Oakville, OR 87765-2313	47
KWAR--Miami	8731 Van Dyke Road	Jacksonville, MS 69832-2217	17
Wong Fong Liu	732 Lilly Lane	Santa Maria, FL 34089-5573	28X
Harry P. MacMillian, Senator	132 J Street	Dover, DE 03456-1080	44
Martin Mills Motel, The	2345 89th Street	New York, NY 10034-4523	25
Edward Jas. McMichael	546798 Martin Parkway	Avided, OH 31044-3425	20
Agnes Monroe, Miss	8009 Ford Lane	Pittsville, NY 13091-3451	42
Molly Morgan, Miss	6789 Eastern Avenue	Hayward, WI 64834-4521	9
N. W. Travel Bureau	123 Founders Road	Padre Island, TX 78793-3221	39
Walter M. Nathan II	1616 La Pluma Drive	Anaheim, CA 90920-6643	12

Policyholder's Name	Street Address	City, State, ZIP	
Number 5 Skating Rink	3478 Rinkland Road	Topeka, KS 68938-9953	53
#5 Sports Shop	95432 Hillside Drive	Maysville, SD 56432-7754	48
Francis Patrick O'Connell	5686 Winding Street	San Francisco, CA 90411-2378	1
Robert O'Malley (Mrs.)	954 Luellen Avenue	Friendship, TX 75890-3652	36
Francis O'Riley, Father	4 Haven Street	Manchester, NH 23104-7764	6
P A U	4444 Englewood Road	Potstown, OR 87938-3343	52
Plenty County Department of Education	5503 Seville Avenue	Morningstown, MI 34678-2413	56
G. P. Rodriguez	92 Martindale Drive	Cedarlane, WA 43012-0023	27
Guadalupe P. Rodriquez	346 Aloha Road	Honolulu, HI 99949-2113	45
William Saint Clare	2401 Maddox Drive	Bend, OR 87701-3167	4
Juan Saldana	4323 Valleyview Road	Longmount, VA 34589-3457	60
San Luis County Library	8321 River Drive	San Luis, TX 73478-5234	37
Cruz Santos	356 East 12th	Elsa, TX 73145-3776	57X
Paul E. Smith	16 Eve Lane	Cleveland, OH 44108-5648	10
Jos. N. South, Dr.	954 Clay Boulevard	Albany, NY 12207-2371	2
70 South East Inc.	7893 Hot Springs Ave.	Los Angeles, CA 90474-7643	8
Mary Speers, Professor	4200 Schoolhouse Drive	Merrymack, WA 43935-5636	40
Marilyn Swazye, D.D.S.	345 Winnona Drive	San Diego, CA 90494-7438	21
T U B Distributors	553 Merle Place	Tacoma, WA 43303-3586	30
Texas State Department of Land Management	2134 Delft Drive	Austin, TX 74532-3267	35
Texas State Department of Recreation	3127 Hardrock Boulevard	Houston, TX 79887-8856	55
United Motor Company	21300 College Park Drive	Peoria, WA 43873-8823	29
U. S. Government Department of State	4000 Mayday Drive	Washington, DC 39025-0045	32
University of Maine	1432 Mainland Drive	Augusta, ME 86350-0563	51
Walters Brothers Grocery	4633 Whittington Street	Broadmore, MI 55551-4030	53
Geo. Wellington, Mr.	2005 Technology Drive	Sunnyside, AZ 36980-2458	15
Marian Wilson-Reed	6894 Duel Drive	Tacoma, WA 41330-3566	34
Fong Liu Wong	732 Lilly Lane	Santa Maria, FL 34089-5573	28
Robt. M. Yantze, Ph.D.	698 Hurricane Lane	Minneapolis, MN 55431-6315	23

Numeric Filing Order

Policy No.	Name	Street Address	City, State, ZIP	
00-11527463-32	U. S. Govt. Dept. of State	4000 Mayday Drive	Washington, DC 39025-0045	32
00-11527572-55	Texas State Dept. of Recreation	3127 Hardrock Boulevard	Houston, TX 79887-8856	55
00-11527753-35	Texas State Dept. of Land Mgmt.	2134 Delft Drive	Austin, TX 74532-3267	35
00-11527824-37	San Luis County Library	8321 River Drive	San Luis, TX 73478-5234	37
02-22841181-39	N. W. Travel Bureau	123 Founders Road	Padre Island, TX 78793-3221	39
02-22841881-31	1st National Bank	145 Hibiscus Drive	Monrovia, LA 34216-2632	31
02-22842112-41	Bud Robert's Cafe	843 Lowtide Drive	Corpus Christi, TX 75456-2241	41
02-22842771-36	Robert O'Malley (Mrs.)	954 Luellen Avenue	Friendship, TX 75890-3652	36
02-22847712-57	Santos Cruz	356 East 12th	Elsa, TX 73145-3776	57
02-22848181-53	Number 5 Skating Rink	3478 Rinkland Road	Topeka, KS 68938-9953	53
08-67581517-13	D. E. Publishing Co.	P. O. Box 687	Fowler, MI 48835-3427	13
71 08-67581519-20	Edward Jas. McMichael	546798 Martin Parkway	Avided, OH 31044-3425	20
08-67581537-10	Paul E. Smith	16 Eve Lane	Cleveland, OH 44108-5648	10
08-67581571-26	Joan L. Evins	4563 South Elm Street	Avided, OH 31404-2834	26
08-67585179-56	Plenty County Dept. of Education	5503 Seville Avenue	Morningstown, MI 34678-2413	56
08-67585779-33	Walter Bros. Grocery	4633 Whittington Street	Broadmore, MI 55551-4030	33
13-45826780-28	Fong Liu Wong	732 Lilly Lane	Santa Maria, FL 34089-5573	28
13-45827801-50	El Grande Cleaners	82346 Holiday Road	Smithlane, MS 64680-4442	50
13-45828706-54	Addison Foundation, The	321 Eduardo Drive	Springland, GA 93578-5764	54
13-45828760-24	Annette De Leon, Miss	865 North Bridge St.	Gayland, FL 53794-7523	24
13-45828770-17	KWAR-Miami	8731 Van Dyke Road	Jacksonville, MS 69832-2217	17
19-75248683-22	Leon E. English, Bishop	4300 Broadmore Street	Denver, CO 22308-4437	22
19-75284683-23	Robt. M. Yantze, Ph. D.	698 Hurricane Lane	Minneapolis, MN 55431-6315	23
19-75284881-18	5th Avenue Hair Design	231 5th Avenue	Cambridge, MN 55132-6325	18
19-75286438-9	Molly Morgan, Miss	6789 Eastern Avenue	Hayward, WI 64834-4521	9
19-75286483-48	#5 Sports Shop	95432 Hillside Drive	Maysville, SD 56432-7754	48
37-95783182-38	First American Thrift Co.	764 Abrigail Blvd.	Long Creek, NY 13478-7597	38
37-95783812-3	Father James	5668 Springton Road	Allentown, PA 18104-7256	3

Policy No.	Name	Street Address	City, State, ZIP	
37-97234890-42	Agnes Monroe, Miss	8009 Ford Lane	Pittsville, NY 13091-3451	42
37-97234980-14	Robert G. Graham, Jr.	315 Beverly Drive	Dartmouth, MD 02785-3326	14
37-97329084-44	Harry P. MacMillian, Senator	132 J Street	Dover, DE 03456-1080	44
37-97329408-25	Martin Mills Motel, The	2345 89th Street	New York, NY 10034-4523	25
37-97842903-16	\$ Value Supermarket	9460 Elm Street	Darrington, NY 14408-7845	16
37-97843099-43	East-West Travels	45000 Exotic Street	Itaska, NH 21456-9065	43
37-97843800-46	Joan L. Evins	5578 Morgandale Blvd.	Riverdale, NY 10893-4763	46
37-97843891-60	Juan Saldana	4323 Valleyview Road	Longmount, VA 34589-3457	60
37-97843990-11	Garcia & Sons Inc.	5514 Elvira Lane	Centerfield, NY 12720-2313	11
37-97849230-51	University of Maine	1432 Mainland Drive	Augusta, ME 86350-0563	51
37-97849302-6	Francis O'Riley, Father	4 Haven Street	Manchester, NH 23104-7764	6
37-97849320-2	Jos. N. South, Dr.	954 Clay Boulevard	Albany, NY 12207-2371	2
42-27251783-19	Carter & James, Inc.	900 Homa Linda Drive	Oceanside, CA 90049-2378	19
42-27251837-15	Geo. Wellington, Mr.	2005 Technology Drive	Sunnyside, AZ 36980-2458	15
42-27275819-12	Walter M. Nathan II	1616 La Pluma Drive	Anaheim, CA 90920-6643	12
72 42-27275891-52	P A U	4444 Englewood Road	Potstown, OR 87938-3343	52
42-27315560-7	E Z Driving School	15 Riding Avenue	San Jose, CA 90404-2436	7
42-27315606-21	Marilyn Swazye, D.D.S.	345 Winona Drive	San Diego, CA 90494-7438	21
42-27351450-8	South East Inc.	7893 Hot Springs Ave.	Los Angeles, CA 90474-7643	8
42-27354105-4	William Saint Clare	2401 Maddox Drive	Bend, OR 87701-3167	4
42-27354400-47	Robert G. Graham, Sr.	5678 River Road	Oakville, OR 87765-2313	47
42-27375660-1	Francis Patrick O'Connell	5686 Winding Street	San Francisco, CA 90411-2378	1
48-86372801-30	T U B Distributors	553 Merle Place	Tacoma, WA 43303-3586	30
48-86372818-27	G. P. Rodriguez	92 Martindale Drive	Cedarlane, WA 43012-0023	27
48-86372889-40	Mary Speers, Professor	4200 Schoolhouse Drive	Merrymack, WA 43935-5636	40
48-86372898-59	Eileen D'Marco, Mrs.	4545 Redvale Drive	Rivermont, MT 34568-6342	59
48-86372981-5	B-17 Dude Ranch	Middletown Highway	Vancouver, WA 43661-0943	5
48-86372988-29	United Motor Company	21300 College Park Drive	Peoria, WA 43873-8823	29
48-86382718-34	Marian Wilson-Reed	6894 Duel Drive	Tacoma, WA 41330-3566	34
48-86382748-58	Brother Michael	5640 Rider Road	Spokane, WA 43205-4838	58
48-86382780-49	Juan de la Garza, Mr.	4589 Dail Terrace	Montealto, NV 83567-0954	49
50-73829851-45	Gudalupe P. Rodriguez	346 Aloha Road	Honolulu, HI 99949-2113	45

Geographic Filing Order

Geographic Region	Policyholders Name	Street Address	City, State, ZIP	
Govt. Agencies:	San Luis County Library	8321 River Drive	San Luis, TX 73478-5234	37
	TX State Dept. of Land Mgmt.	2134 Delft Drive	Austin, TX 74532-3267	35
	TX State Dept. of Recreation	3127 Hardrock Boulevard	Houston, TX 79887-8856	55
	U. S. Govt. Dept. of State	4000 Mayday Drive	Washington, DC 39025-0045	32
Great Lakes Region:	D. E. Publishing Co.	P. O. Box 687	Fowler, MI 48835-3427	13
	Joan L. Evins	4563 South Elm Street	Avided, OH 31404-2834	26
	Edward Jas. McMichael	546798 Martin Parkway	Avided, OH 31044-3425	20
	Plenty Co. Dept. of Education	5503 Seville Avenue	Morningstown, MI 34678-2413	56
	Paul E. Smith	16 Eve Lane	Cleveland, OH 44108-5648	10
	Walter Bros. Grocery	4633 Whittington Street	Broadmore, MI 55551-4030	33
No. Central Region:	5th Avenue Hair Design	231 5th Avenue	Cambridge, MN 55132-6325	18
	Leon E. English, Bishop	4300 Broadmore Street	Denver, CO 22308-4437	22
	Molly Morgan, Miss	6789 Eastern Avenue	Hayward, WI 64834-4521	9
	Rbt. M. Yantze, Ph.D.	698 Hurricane Lane	Minneapolis, MN 55431-6315	23
	#5 Sports Shop	95432 Hillside Drive	Maysville, SD 56432-7754	48
Northeast Region:	East-West Travels	45000 Exotic Street	Itaska, NH 21456-9065	43
	Joan L. Evins	5578 Morgandale Blvd.	Riverdale, NY 10893-4763	46
	First American Thrift Co.	764 Abrigail Blvd.	Long Creek, NY 13478-7597	38
	Garcia & Sons Inc.	5514 Elvira Lane	Centerfield, NY 12720-2313	11
	Robert G. Graham, Jr.	315 Beverly Drive	Dartmouth, MD 02785-3326	14
	Father James	5668 Springton Road	Allentown, PA 18104-7256	3
	Harry P. MacMillian, Senator	132 J Street	Dover, DE 03456-1080	44
	Martin Mills Motel, The	2345 89th Street	New York, NY 10034-4523	25
	Agnes Monroe, Miss	8009 Ford Lane	Pittsville, NY 13091-3451	42
	Francis O'Riley, Father	4 Haven Street	Manchester, NH 23104-7764	6
	Jos. N. South, Dr.	954 Clay Boulevard	Albany, NY 12207-2371	2
	Juan Saldana	4323 Valleyview Road	Longmount, VA 34589-3457	60
	University of Maine	1432 Mainland Drive	Augusta, ME 86350-0563	51
	\$ Value Supermarket	9460 Elm Street	Darring, NY 14408-7845	16

Geographic Region	Policyholders Name	Street Address	City, State, ZIP	
Northwest Region:	B-17 Dude Ranch	Middletown Highway	Vancouver, WA 43661-0943	5
	Brother Michael	5640 Rider Road	Spokane, WA 43205-4838	58
	Juan de la Garza, Mr.	4589 Dail Terrace	Montealto, NV 83567-0954	49
	Eileen D'Marco, Mrs.	4545 Redvale Drive	Rivermont, MT 34568-6342	59
	G. P. Rodriguez	92 Martindale Drive	Cedarlane, WA 43012-0023	27
	Mary Speers, Professor	4200 Schoolhouse Drive	Merrymack, WA 43935-5636	40
	T U B Distributors	553 Merle Place	Tacoma, WA 43303-3586	30
	United Motor Company	21300 College Park Drive	Peoria, WA 43873-8823	29
	Marian Wilson-Reed	6894 Duel Drive	Tacoma, WA 41330-3566	34
So. Central Region:	Bud Robert's Cafe	843 Lowtide Drive	Corpus Christi, TX 75456-2241	41
	Santos Cruz	356 East 12th	Elsa, TX 73145-3776	57
	1st National Bank	145 Hibiscus Drive	Monravia, LA 34216-2632	31
	N. W. Travel Bureau	123 Founders Road	Padre Island, TX 78793-3221	39
	Number 5 Skating Rink	3478 Rinkland Road	Topeka, KS 68938-9953	53
	Robert O'Malley (Mrs.)	954 Luellen Avenue	Friendship, TX 75890-3652	36
Southeast Region:	Addison Foundation, The	321 Eduardo Drive	Springland, GA 93578-5764	54
	Annette De Leon, Miss	865 North Bridge St.	Gayland, FL 53794-7523	24
	El Grande Cleaners	82346 Holiday Road	Smithlane, MS 64680-4442	50
	KWAR-Miami	8731 Van Dyke Road	Jacksonville, MS 69832-2217	17
	Fong Liu Wong	732 Lilly Lane	Santa Maria, FL 34089-5573	28
Southwest Region:	Carter & James, Inc.	900 Homa Linda Drive	Oceanside, CA 90049-2378	19
	E Z Driving School	15 Riding Avenue	San Jose, CA 90404-2436	7
	Walter M. Nathan II	1616 La Pluma Drive	Anaheim, CA 90920-6643	12
	Robert G. Graham, Sr.	5678 River Road	Oakville, OR 87765-2313	47
	Francis Patrick O'Connell	5686 Winding Street	San Francisco, CA 90411-2378	1
	P A U	4444 Englewood Road	Potstown, OR 87938-3343	52
	South East Inc.	7893 Hot Springs Ave.	Los Angeles, CA 90474-7643	8
	William Saint Clare	2401 Maddox Drive	Bend, OR 87701-3167	4
	Marilyn Swazye, D.D.S.	345 Winnona Drive	San Diego, CA 90494-7438	21
	Geo. Wellington, Mr.	2005 Technology Drive	Sunnyside, AZ 36980-2458	15
Other Region:	Gudalupe P. Rodriguez	346 Aloha Road	Honolulu, HI 99949-2113	54

Name: _____

Grade: _____

Section: _____

Date: _____

FILING SIMULATION EVALUATION SHEET

Received	Description
One-Hour Simulation	
Alphabetic Filing	
_____	Update information
_____	Alphabetize cards
_____	Alphabetic client list
Numeric Filing	
_____	Numerical list
Geographic Filing	
_____	Geographic list
Comments:	

Grades	
One-Hour Simulation	
Alphabetic	_____
Numeric	_____
Geographic	_____
Grade Average:	_____

Received	Description
Three-Hour Simulation	
_____	Alphabetical print out
_____	Numerical print out
_____	Geographic print out
Comments:	

Grades	
Three-Hour Simulation	
Enter Data	_____
Alphabetic Output	_____
Numeric Output	_____
Geographic Output	_____
Grade Average:	_____

MODERN MALL INSURANCE COMPANY

You have just returned from a two week vacation and find that you have been promoted to work in the record management department at Modern Mall Insurance Company. One of your many duties is to to prepare a client file card for each new customer. Since this is the head office for the company, all client information is at one central location, your office.

Mrs. Eileen Moore is your boss, and she has just given you the following list of new client information that needs to be verified with the cards that have been prepared before the cards can be filed.

ALPHABETIC FILE ORGANIZATION

1. Using the cards provided, fill in all the missing and incorrect information provided on the New Clients List. Use a black pen to make corrections on the card. Do not forget to make cross reference cards as requested.
2. After all corrections and additions have been made, alphabetize all the cards using the ARMA filing rules that have been adopted by the insurance company.
3. Use the alphabetized cards to key in the list of client names. Verify that you have keyed them in correctly. Title the list "December New Clients List."
4. Turn the alphabetized list over to your supervisor.

NUMERIC FILE ORGANIZATION

1. Using the alphabetic card file you just prepared, organize the cards numerically, according to the policy numbers.
2. Use the numerically organized cards to prepare a list of clients according to policy numbers. The title of this list should be "December Policy Number Assignments." Include the name of the policy holder and leave one blank line between each numerical division as in the example below

42-78999999 John Doe

42-79999999 Jerry Jones

48-00000000 Alfred Jacobs

GEOGRAPHIC FILE ORGANIZATION

Mr. Martin, one of the assistants to the president, has asked also that you make up a geographic file for him to use in contacting branches throughout the U.S.

1. Using the same cards, organize the cards for a geographic file.
2. Use the following geographic divisions when keying in a list of the policyholders for each division:

Govt. Agencies

Great Lakes Region	Michigan, Ohio,
No. Central Region	Colorado, Minnesota, South Dakota, Wisconsin
Northeast Region	Deleware, Maine, Maryland, New York, New Hampshire, Pennsylvania, Virginia
Northwest Region	Montana, Nevada, Washington
So. Central Region	Kansas, Louisiana, New Mexico, Oklahoma, Texas
Southeast Region	Alabama, Florida, Georgia, Mississippi
Southwest Region	Arizona, California, Oregon,
Other	Alaska, Hawaii

NEW CLIENTS FOR MODERN MALL INSURANCE COMPANY

42-27375660-1

Francis Patrick O'Connell
5686 Winding Street
San Francisco, CA 90411-2378
(415)876-9345
Janice O'Connell
5686 Winding Street
San Francisco, CA 90411-2378

37-97849302-6

Father Francis O'Riley
4 Haven Street
Manchester, NH 23104-7764
(603)752-4275
Jonas O'Riley
100 Briarwood
Commerce, TX 75428-5643

37-97843990-11

Garcia & Sons Inc.
5514 Elvira Lane
Centerfield, NY 12720-2313
(716)052-5655
Jose Garcia
1835 South 5th
Centerfield, NY 12720-2313

37-97849320-2

Dr. Jos. N. South
954 Clay Boulevard
Albany, NY 12207-2371
(518)886-4754
Jessie South
954 Clay Boulevard
Albany, NY 12207-2371

42-27315560-7

E Z Driving School
15 Riding Avenue
San Jose, CA 90404-2436
(408)443-6673
Joseph Tarpley
Route 1, Box 268
San Jose, CA 90408-2475

42-27275819-12

Walter M. Nathan II
1616 La Pluma Drive
Anaheim, CA 90920-6643
(714)234-4737
Stephanie Reichel
1616 La Pluma Drive
Anaheim, CA 90920-6643

37-95783812-3

Father James
5668 Springton Road
Allentown, PA 18104-7256
(514)567-9356
Springton Parish
5660 Springton Road
Allentown, PA 18104-7256

42-27351450-8

South East Inc.
7893 Hot Springs Ave.
Los Angeles, CA 90474-7643
(213)225-6543
John Hawkins
4789 Hot Springs Ave.
Los Angeles, CA 90474-7643

08-67581517-13

D. E. Publishing Co.
P. O. Box 687
Fowler, MI 48835-3427
(313)074-4790
Richard Evans
1211 West 10th
Fowler, MI 48835-3422

42-27354105-4

William Saint Clare
2401 Maddox Drive
Bend, OR 87701-3167
(503)408-6882
Alfred Jones
3630 Arapaho
Mesa, AZ 45622-0145

19-75286438-9

Miss Molly Morgan
6789 Eastern Avenue
Hayward, WI 64834-4521
(414)568-6636
Jessica Fletcher
203 Morse Avenue
Hayward, WI 64834-4521

37-97234980-14

Robert G. Graham, Jr.
315 Beverly Drive
Dartmouth, MD 02785-3326
(617)967-8905
Jennifer R. Graham
315 Beverly Drive
Dartmouth, MD 02785-3326

48-86372981-5

B-17 Dude Ranch
Middletown Highway
Vancouver, WA 43661-0943
(206)809-5534
John Jefferies
Middletown Highway
Vancouver, WA 43661-0943

08-67581537-10

Paul E. Smith
16 Eve Lane
Cleveland, OH 44108-5648
(216)442-5332
Eva P. Smith
16 Eve Lane
Cleveland, OH 44108-5648

42-27251837-15

Mr. Geo. Wellington
2005 Technology Drive
Sunnyside, AZ 36980-2458
(209)997-3357
Pattie Wellington
2005 Technology Drive
Sunnyside, AZ 36980-2458

**OSS/Simulations/Section IV
Filing Activities**

37-97842903-16

\$ Value Supermarket
9460 Elm Street
Darring, NY 14408-7845
(914)647-7428
Tony Sheer
5623 North Jones
Jacksonville, MS 69832-2215

42-27315606-21

Marilyn Swazye, D.D.S.
345 Winona Drive
San Diego, CA 90494-7438
(619)627-5245
Patrick J. Swazye
345 Winona Drive
San Diego, CA 90494-7438

08-67581571-26

Joan L. Evins
4563 South Elm Street
Avided, OH 31404-2834
(216)557-5244
Richard J. Evins
4563 South Elm Street
Avided, OH 31404-2834

13-45828770-17

KWAR-Miami
8731 Van Dyke Road
Jacksonville, MS 69832-2217
(601)321-5658
Davy Jones
3721 Carson Road
Anaheim, CA 92001-1342

19-75248683-22

Bishop Leon E. English
4300 Broadmore Street
Denver, CO 22308-4437
(303)686-6249
St. Michael's Church
4390 Broadmore Street
Denver, CO 22308-4437

48-86372818-27

G. P. Rodriguez
92 Martindale Drive
Cedarlane, WA 43012-0023
(509)575-4245
Marissa Rodriguez
92 Martindale Drive
Cedarlane, WA 43012-0023

19-75284881-18

5th Avenue Hair Design
231 5th Avenue
Cambridge, MN 55132-6325
(218)329-6849
Frances Robinson
4514 Blaisdell Avenue
Minneapolis, MN 55431-6345

19-75284683-23

Robt. M. Yantze, Ph. D.
698 Hurricane Lane
Minneapolis, MN 55431-6315
(612)668-8412
Dorothy Yantze
698 Hurricane Lane
Minneapolis, MN 55431-6315

13-45826780-28

Fong Liu Wong
732 Lilly Lane
Santa Maria, FL 34089-5573
(Cross Reference under
Wong Fong Liu)
(813)682-5431
Joseph Fong Wong
732 Lilly Lane
Santa Maria, FL 34089-5573

42-27251783-19

Carter & James, Inc.
900 Homa Linda Drive
Oceanside, CA 90049-2378
(714)563-7564
Carolyn Carter-James
104 Royal Lane
Greenville, TX 75401-2156

13-45828760-24

Miss Annette De Leon
865 North Bridge St.
Gayland, FL 53794-7523
(904)755-2310
Buddy De Leon
8339 Ewing Road
Minneapolis, MN 55431-7523

48-86372988-29

United Motor Company
21300 College Park Dr.
Peoria, WA 43873-8823
(509)273-6884
Karl Draheim
3822 Apean Way
Peoria, WA 43873-8823

08-67581519-20

Edward Jas. McMichael
546798 Martin Parkway
Avided, OH 31044-3425
(216)648-9551
Suzanne McMichael
546789 Martin Parkway
Avided, OH 31044-3425

37-97329408-25

The Martin Mills Motel
2345 89th Street
New York, NY 10034-4523
(212)255-7718
Matthew Martin
2345 89th Street
New York, NY 10034-4523

48-86372801-30

T U B Distributors
553 Merle Place
Tacoma, WA 43303-3586
(206)723-6830
Teresa "Tess" Wilton
4253 Pearl
Tacoma, WA 43303-3566

OSS/Simulations/Section IV
Filing Activities

02-22841881-31
 1st National Bank
 145 Hibiscus Drive
 Monrovia, LA 34216-2632
 (318)148-2220
 Alfred Johnson Estate
 550 West Waco
 Lafayette, LA 34428-2551

02-22842771-36
 Mrs. Robert O'Malley
 954 Luellen Avenue
 Friendship, TX 75890-3652
 (409)248-2236
 Robert O'Malley
 954 Luellen Avenue
 Friendship, TX 75890-3652

02-22842112-41
 Bud Robert's Cafe
 843 Lowtide Drive
 Corpus Christi, TX 75456-2241
 (512)142-2221
 Bud Robert
 860 Lowtide Terrace
 Corpus Christi, TX 75456-2241

00-11527463-32
 U. S. Government
 Department of State
 4000 Mayday Drive
 Washington, DC 39025-0045
 (202)295-1100
 Edwards Foundation
 300 Avenue of the Americas
 Washington, DC 39025-0015

00-11527824-37
 San Luis County Library
 8321 River Drive
 San Luis, TX 73478-5234
 (915)228-7341
 San Luis County Antiques
 1400 West Cado
 San Luis, TX 73478-5234

37-97234890-42
 Miss Agnes Monroe
 8009 Ford Lane
 Pittsville, NY 13091-3451
 (716)899-2348
 Clare Legree
 3072 Park Street
 Pittsville, NY 13091-3451

08-67585779-33
 Walters Bros. Grocery
 4633 Whittington St.
 Broadmore, MI 55551-4030
 (616)525-7680
 George J. Walters
 4721 Westwood
 Broadmore, MI 55551-4033

37-95783182-38
 First American Thrift Co.
 764 Abrigail Blvd.
 Long Creek, NY 13478-7597
 (914)832-8138
 Jefferson Estate
 1600 Big Apple Road
 Mount Vernon, NY 14378-7597

37-97843099-43
 East-West Travels
 45000 Exotic Street
 Itaska, NH 21456-9065
 (603)483-4399
 Gillian Border
 123 Alpha Street
 Itaska, NH 21456-9065

48-86382718-34
 Marian Wilson-Reed
 6894 Duel Drive
 Tacoma, WA 43330-3566
 (206)178-2368
 Orwin Wilson-Reed
 6894 Duel Drive
 Tacoma, WA 43330-3566

02-22841181-39
 N. W. Travel Bureau
 123 Founders Road
 Padre Island, TX 78793-3221
 (512)118-1482
 James Rowe
 8932 Sand Pebble
 Padre Island, TX 78793-3221

37-97329084-44
 Sen. Harry P. MacMillian
 132 J Street
 Dover, DE 03456-1080
 (302)913-4804
 Josephine P. MacMillian
 132 J Street
 Dover, DE 03456-1080

00-11527753-35
 Texas State Dept. of
 Land Management
 2134 Delft Drive
 Austin, TX 74532-3267
 (512)863-2871
 Field and Stream Collection
 1500 North North Congress
 Austin, TX 54532-3267

48-86372889-40
 Professor Mary Speers
 4200 Schoolhouse Dr.
 Merrymack, WA 43935-5636
 (206)409-8872
 Paul A. Speers
 4200 Schoolhouse Dr.
 Merrymack, WA 43935-5636

50-73829851-45
 Guadalupe P. Rodriguez
 346 Aloha Road
 Honolulu, HI 99949-2113
 (808)372-2841
 Maria Martinez Rodriquez
 346 Aloha Drive
 Honolulu, HI 99949-2113

OSS/Simulations/Section IV
Filing Activities

37-97843800-46

Joan L. Evins
 5578 Morgandale Blvd.
 Riverdale, NY 10893-4763
 (716)843-4883
 Marty K. Evins
 5578 Morgandale Blvd.
 Riverdale, NY 10893-4763

37-97849230-51

University of Maine
 1432 Mainland Drive
 Augusta, ME 86350-0563
 (207)492-5130
 ARA Document Collection
 3200 State Street
 Philadelphia, PA 65974-2145

08-67585179-56

Plenty County Dept. of
 Education
 5503 Seville Avenue
 Morningstown, MI 34678-
 2413
 (313)994-8156
 Morningstown High School
 600 South Culver
 Morningstown, MI 34678-
 2413

42-27354400-47

Robert G. Graham, Sr.
 5678 River Road
 Oakville, OR 87765-2313
 (503)676-7850
 Robert G. Graham, Jr.
 7425 West 105th St.
 Bloomington, MN 55421-
 4327

42-27275891-52

P A U
 4444 Englewood Road
 Potstown, OR 87938-3343
 (503)468-8582
 Ronald McCaslin
 3025 St. Paul Avenue
 Potstown, OR 87938-3343

02-22847712-57

Santos Cruz
 356 East 12th
 Elsa, TX 73145-3776
 (Cross-reference under Cruz
 Santos)
 (512)689-1183
 George Cruz
 1923 Casa Linda Way
 San Juan, TX 71254-3529

19-75286483-48

#5 Sports Shop
 95432 Hillside Dr.
 Maysville, SD 56432-7754
 (605)286-8449
 Mary May
 1415 May Terrace
 Maysville, SD 56432-7754

02-22848181-53

Number 5 Skating Rink
 3478 Rinkland Road
 Topeka, KS 68938-9953
 (913)633-4568
 Bill Beltron
 7916 Johnson Street
 Emporia, KS 68401-3342

48-86382748-58

Brother Michael
 5640 Rider Road
 Spokane, WA 43205-4838
 (509)994-2849
 Church of the Latter Day
 Saints
 50 Glory Road
 Georgeland, GA 95388-3526

48-86382780-49

Mr. Juan de la Garza
 4589 Dail Terrace
 Montealto, NV 83567-0954
 (702)863-4918
 Alecia Juarez de la Garza
 4589 Dail Terrace
 Montealto, NV 3567-0954

13-45828706-54

The Addison Foundation
 321 Eduardo Drive
 Springland, GA 93578-5764
 (912)846-2286
 Casandra Addison
 8534 Lansing Road
 Springland, GA 93578-5764

48-86372898-59

Mrs. Eileen D'Marco
 4545 Redvale Drive
 Rivermont, MT 34568-6342
 (406)913-5583
 Henrico D'Marco
 109 Valley View Lane
 Liverpool, IA 70201-4256

13-45827801-50

El Grande Cleaners
 82346 Holiday Road
 Smithlane, MS 64680-4442
 (601)268-5246
 Jack Anderson
 3925 5th Avenue
 Smithlane, MS 64680-4442

00-11527572-55

Texas State Dept. of
 Recreation
 3127 Hardrock Boulevard
 Houston, TX 79887-8856
 (713)468-8822
 Jason Foundation
 8930 Chimney Rock Road
 Houston, TX 79872-8865

37-97843891-60

Juan Saldana
 4323 Valleyview Road
 Longmount, VA 34589-3457
 (703)318-9463
 Jon Jeffries
 130 West 50th
 Houston, TX 79871-3457

OSS/Simulations/Section IV
Filing Activities

Policy No. 42-27375660-1 Policy Holder Francis Patrick O'Conner Street Address 5686 Winding Street City, State, Zip San Francisco, CA 90411-2378 Telephone No. (415) 876-9345 Name of Primary Beneficiary Janice O'Conner Street Address 5686 Winding Street City, State, Zip San Francisco, CA 90411-2378	Policy No. 37-91844302-8 Policy Holder Father Francis O'Riley Street Address 4 Haven Street City, State, Zip Manchester, NH 23104-7764 Telephone No. (603) 752-4275 Name of Primary Beneficiary Jonas O'Riley Street Address 100 Briarwood City, State, Zip Commerce, TX 75428-5643
Policy No. 37-97843990-11 Policy Holder Garcia & Sons Inc. Street Address 4515 Elvina Lane City, State, Zip Centerfield, NY 12720-2313 Telephone No. (716) 052-5655 Name of Primary Beneficiary Jose Garcia Street Address 1835 South 5th City, State, Zip Centerfield, NY 12720-2313	Policy No. 37-97849320-2 Policy Holder Dr. Jos. N. South Street Address 854 Clay Boulevard City, State, Zip Albany, NY 21702-7312 Telephone No. (518) 886-4754 Name of Primary Beneficiary Jessie South Street Address 954 Clay Boulevard City, State, Zip Albany, NY 21702-7312
Policy No. 42-37251506-7 Policy Holder E Z Driving School Street Address 15 Riding Avenue City, State, Zip San Jose, CA 90404-2436 Telephone No. (408) 443-6673 Name of Primary Beneficiary Joseph Tarpley Street Address Route 1, Box 268 City, State, Zip San Jose, CA 90408-2475	Policy No. 42-27275819-12 Policy Holder Walter M. Nathan II Street Address 1616 La Palma Drive City, State, Zip Anaheim, CA 90920-6643 Telephone No. (714) 234-4737 Name of Primary Beneficiary Stephanie Reichel Street Address 1616 La Palma Drive City, State, Zip Anaheim, CA 90920-6643

OSS/Simulations/Section IV
Filing Activities

Policy No.
37-95783812-3

Policy Holder
Father James

Street Address
5668 Springstown Road

City, State, Zip
Allentown, PA 18104-7256

Telephone No.
(514) 567-9356

Name of Primary Beneficiary
Springstown Parish

Street Address
5660 Springstown Road

City, State, Zip
Allentown, PA 18104-7256

Policy No.
08-67581517-13

Policy Holder
D. E. Publishing Co.

Street Address
P. O. Box 687

City, State, Zip
Fowler, ME 48835-3427

Telephone No.
(313) 074-4790

Name of Primary Beneficiary
Richard Evans

Street Address
1211 West 10th

City, State, Zip
Fowler, ME 48835-3422

Policy No.
19-75286438-9

Policy Holder
Miss Molly Morgan

Street Address
6789 East Fern Ave.

City, State, Zip
Hayward, WI 64834-4521

Telephone No.
(414) 568-6636

Name of Primary Beneficiary
Jessica Fletcher

Street Address
203 Morse Avenue

City, State, Zip
Hayward, WI 64834-4521

Policy No.
42-27351450-8

Policy Holder
South East Inc.

Street Address
7893 Hot Springs Ave.

City, State, Zip
Los Angeles, CA 94047-6473

Telephone No.
(213) 225-6543

Name of Primary Beneficiary
John Hawkins

Street Address
4789 Hot Springs Ave.

City, State, Zip
Los Angeles, CA 94047-6473

Policy No.
42-27354105-4

Policy Holder
William St. Clair

Street Address
2401 Maddox Drive

City, State, Zip
Bend, OR 87701-3167

Telephone No.
(503) 408-6882

Name of Primary Beneficiary
Alfred Jones

Street Address
3630 Arapaho

City, State, Zip
Mesa, AZ 45622-0145

Policy No.
37-97234980-14

Policy Holder
Robert G. Graham, Jr.

Street Address
315 Beverly Drive

City, State, Zip
Darthmont, MD 02785-3326

Telephone No.
(617) 967-8905

Name of Primary Beneficiary
Jennifer R. Graham

Street Address
315 Beverly Drive

City, State, Zip
Darthmont, MD 02785-3326

OSS/Simulations/Section IV
Filing Activities

Policy No.
48-76728318-50

Policy Holder
B-17 Dude Ranch

Street Address
Middletown Highway

City, State, Zip
Vancouver, WA 43661-0943

Telephone No.
(206) 809-5534

Name of Primary Beneficiary
John Jefferies

Street Address
Middletown Highway

City, State, Zip
Vancouver, WA 43661-0943

Policy No.
08-67581537-10

Policy Holder
Paul E. Smith

Street Address
16 Evelyn

City, State, Zip
Cleveland, OH 44108-5648

Telephone No.
(216) 442-5332

Name of Primary Beneficiary
Eva P. Smith

Street Address
16 Evelyn

City, State, Zip
Cleveland, OH 44108-5648

Policy No.
42-27251837-15

Policy Holder
Mr. Geo. Wellington

Street Address
5002 Technology Drive

City, State, Zip
Sunnyside, AZ 36980-2458

Telephone No.
(209) 997-3357

Name of Primary Beneficiary
Pattie Wellington

Street Address
5002 Technology Drive

City, State, Zip
Sunnyside, AZ 36980-2458

Policy No.
37-97842903-16

Policy Holder
\$ Value Supermarket

Street Address
9460 Elm Street

City, State, Zip
Darring, NY 41108-4578

Telephone No.
(914) 647-7428

Name of Primary Beneficiary
Tony Sheer

Street Address
5623 North Jones

City, State, Zip
Jacksonville, MA 69832-2215

Policy No.
42-27315606-21

Policy Holder
Patrick J. Swazye

Street Address
345 Winnona Drive

City, State, Zip
San Diego, CA 90494-7438

Telephone No.
(619) 627-5245

Name of Primary Beneficiary
Marilyn Swazye, D.D.S.

Street Address
345 Winnona Drive

City, State, Zip
San Diego, CA 90494-7438

Policy No.
08-67581571-26

Policy Holder
Joan L. Evans

Street Address
4563 South Elm Street

City, State, Zip
Avided, OH 31404-2834

Telephone No.
(216) 557-5244

Name of Primary Beneficiary
Richard J. Evans

Street Address
4563 South Elm Street

City, State, Zip
Avided, OH 31404-2834

OSS/Simulations/Section IV
Filing Activities

Policy No.

13-45828770-17

Policy Holder

WKAR - Miami

Street Address

8731 Van Dyke Road

City, State, Zip

Jacksonville, MS 69832-2217

Telephone No.

(601) 321-5658

Name of Primary Beneficiary

Davy Jones

Street Address

3721 Carson Road

City, State, Zip

Anaheim, CA 92001-1342

Policy No.

19-75248683-22

Policy Holder

Bishop Leon E. English

Street Address

4300 Broadway Street

City, State, Zip

Denver, CO 22308-4437

Telephone No.

(303) 686-6249

Name of Primary Beneficiary

St. Michael's Church

Street Address

4390 Broadway Street

City, State, Zip

Denver, CO 22308-4437

Policy No.

48-86723188-72

Policy Holder

G. P. Rodriguez

Street Address

92 Martindale Drive

City, State, Zip

Cedarlane, WA 43012-0023

Telephone No.

(509) 575-4245

Name of Primary Beneficiary

Marissa Rodriguez

Street Address

92 Martindale Drive

City, State, Zip

Cedarlane, WA 43012-0023

Policy No.

19-75284881-18

Policy Holder

5th Avenue Hair Design

Street Address

231 5th Avenue

City, State, Zip

Cambridge, MI 55132-6325

Telephone No.

(218) 329-6849

Name of Primary Beneficiary

Frances Robinson

Street Address

4514 Blaisdell Avenue

City, State, Zip

Minneapolis, MI 55431-6345

Policy No.

19-75284683-23

Policy Holder

Robert N. Yatze, Ph.D.

Street Address

698 Hurricane Lane

City, State, Zip

Minneapolis, MN 55431-6315

Telephone No.

(612) 668-8412

Name of Primary Beneficiary

Dorothy Yatze

Street Address

698 Hurricane Lane

City, State, Zip

Minneapolis, MN 55431-6315

Policy No.

13-45826780-28

Policy Holder

Fong Lui Wong

Street Address

732 Lolly Lane

City, State, Zip

Santa Maria, FL 34089-5573

Telephone No.

(813) 682-5431

Name of Primary Beneficiary

Joseph Fong Wong

Street Address

732 Lolly Lane

City, State, Zip

Santa Maria, FL 34089-5573

OSS/Simulations/Section IV
Filing Activities

Policy No.
42-27251783-19

Policy Holder
Carter & James, Inc.

Street Address
900 Loma Linda Drive

City, State, Zip
Oceanside, CA 90049-2378

Telephone No.
(714) 563-7564

Name of Primary Beneficiary
Carolyn Carter-James

Street Address
104 Royal Lane

City, State, Zip
Greenville, TX 75401-5612

Policy No.
13-45828760-24

Policy Holder
Miss Annette deLeon

Street Address
865 North Bridge St.

City, State, Zip
Gayland, FL 53794-7523

Telephone No.
(904) 755-2310

Name of Primary Beneficiary
Buddy deLeon

Street Address
8339 Ewing Road

City, State, Zip
Minneapolis, MN 55431-7523

Policy No.
48-86372988-29

Policy Holder
United Motor Company

Street Address
20031 College Park Dr.

City, State, Zip
Peoria, WA 43873-8823

Telephone No.
(509) 273-6884

Name of Primary Beneficiary
Karl Draheim

Street Address
2283 Apean Way

City, State, Zip
Peoria, WA 43873-8823

Policy No.
80-67518591-02

Policy Holder
Edward Jas. McMichael

Street Address
546798 Martin Parkway

City, State, Zip
Avided, OH 31044-3425

Telephone No.
(216) 648-9551

Name of Primary Beneficiary
Suzanne McMichael

Street Address
546798 Martin Parkway

City, State, Zip
Avided, OH 31044-3425

Policy No.
37-97329408-25

Policy Holder
The Martin Mills Motel

Street Address
2345 80th Street

City, State, Zip
New York, NY 10034-4523

Telephone No.
(212) 255-7718

Name of Primary Beneficiary
Matthew Martin

Street Address
2345 80th Street

City, State, Zip
New York, NY 10034-4523

Policy No.
48-86372801-30

Policy Holder
Tub Distributions

Street Address
553 Merle Place

City, State, Zip
Tacoma, WA 43303-3586

Telephone No.
(206) 723-6830

Name of Primary Beneficiary
Teresa "Tess" Wilton

Street Address
4253 Pearl

City, State, Zip
Tacoma, WA 43303-3566

OSS/Simulations/Section IV
Filing Activities

Policy No. 02-22841881-31 Policy Holder 1st National Bank Street Address 145 Hibiscus Drive City, State, Zip Monrovia, LA 34216-2632 Telephone No. (318) 148-2220 Name of Primary Beneficiary Alfred Johnson Estate Street Address 550 West Waco City, State, Zip Lafayette, LA 34216-2632	Policy No. 02-22842771-36 Policy Holder Mrs. Robert O'Malley Street Address 954 Luellen Avenue City, State, Zip Friendship, TX 75890-3652 Telephone No. (214) 842-3622 Name of Primary Beneficiary Robert O'Malley Street Address 954 Luellen Avenue City, State, Zip Friendship, TX 75890-3652
Policy No. 20-22481212-41 Policy Holder Bud Robert's Cafe Street Address 843 Lowtide Drive City, State, Zip Corpus Christi, TX 75456-2241 Telephone No. (512) 142-2221 Name of Primary Beneficiary Bud Robert Street Address 860 Lowtide Terrace City, State, Zip Corpus Christi, TX 75456-2241	Policy No. 00-11527463-32 Policy Holder U.S. Government Department of Street Address State 4000 Mayday Drive City, State, Zip Washington, DC 30952-4500 Telephone No. (202) 295-1100 Name of Primary Beneficiary Edwards Foundation Street Address 300 Avenue of the Americas City, State, Zip Washington, DC 30952-5100
Policy No. 00-11527824-37 Policy Holder St. Louis Co. Library Street Address 8321 River Drive City, State, Zip San Luis, TX 73478-5234 Telephone No. (915) 228-7341 Name of Primary Beneficiary St. Louis Co. Antiques Street Address 1400 West Cado City, State, Zip San Luis, TX 73478-5234	Policy No. 37-97234890-42 Policy Holder Miss Agnes Monroe Street Address 8009 Ford Lane City, State, Zip Pittsville, NY 13091-3451 Telephone No. (617) 899-2348 Name of Primary Beneficiary Clare Legree Street Address 3072 Park Street City, State, Zip Pittsville, NY 13091-3451

OSS/Simulations/Section IV
Filing Activities

Policy No.

08-67585779-33

Policy Holder

Walters Bros. Company

Street Address

4633 Whittingham St.

City, State, Zip

Broadmore, MI 55551-4030

Telephone No.

(616) 525-7680

Name of Primary Beneficiary

George J. Walters

Street Address

4721 Westwood

City, State, Zip

Broadmore, MI 55551-4033

Policy No.

37-95783182-38

Policy Holder

1st American Thrift Co.

Street Address

764 Abrigail Blvd.

City, State, Zip

Long Creek, NY 13478-7597

Telephone No.

(917) 832-8138

Name of Primary Beneficiary

Jefferson Estate

Street Address

1600 Big Apple Road

City, State, Zip

Mount Vernon, NY 14378-7597

Policy No.

37-97843099-43

Policy Holder

East and West Travels

Street Address

45000 Exotic Street

City, State, Zip

Itaska, NH 21456-9065

Telephone No.

(603) 483-4399

Name of Primary Beneficiary

Gillian Border

Street Address

123 Alpha Street

City, State, Zip

Itaska, NH 21456-9065

Policy No.

48-86382718-34

Policy Holder

Marian Wilson-Reed

Street Address

6894 Duel Drive

City, State, Zip

Tacoma, WA 40330-3566

Telephone No.

(206) 178-2368

Name of Primary Beneficiary

Orwin Wilson-Reed

Street Address

6894 Duel Drive

City, State, Zip

Tacoma, WA 40330-3566

Policy No.

02-22841181-39

Policy Holder

N. W. Travel Bureau

Street Address

123 Flounders Road

City, State, Zip

Padre Island, TX 78793-3221

Telephone No.

(512) 118-1482

Name of Primary Beneficiary

James Rowe

Street Address

8932 Sand Pebble

City, State, Zip

Padre Island, TX 78793-3221

Policy No.

05-73289815-54

Policy Holder

Guadalupe P. Rodriguez

Street Address

346 Aloha Road

City, State, Zip

Honolulu, HI 99949-2113

Telephone No.

(808) 372-2841

Name of Primary Beneficiary

Maria Martinez Rodriguez

Street Address

346 Aloha Drive

City, State, Zip

Honolulu, HI 99949-2113

OSS/Simulations/Section IV
Filing Activities

Policy No.
37-97329084-44

Policy Holder
Sen. Harry P. MacMillian

Street Address
321 J. Street

City, State, Zip
Dover, DE 03456-1080

Telephone No.
(302) 913-4804

Name of Primary Beneficiary
Josephine P. MacMillian

Street Address
321 J. Street

City, State, Zip
Dover, DE 03456-1080

Policy No.
00-11527753-35

Policy Holder
Texas State Dept. of Land
Management

Street Address
2134 Deft Drive

City, State, Zip
Austin, TX 74532-3267

Telephone No.
(512) 863-2871

Name of Primary Beneficiary
Field and Stream Collection

Street Address
1500 North North Congress

City, State, Zip
Austin, TX 54532-3267

Policy No.
48-86372889-40

Policy Holder
Professor Mary Speers

Street Address
4200 School House Dr.

City, State, Zip
Merrymack, WA 43935-5636

Telephone No.
(206) 409-8872

Name of Primary Beneficiary
Paul A. Speers

Street Address
4200 School House Dr.

City, State, Zip
Merrymack, WA 43935-5636

Policy No.
37-97843800-46

Policy Holder
Joan L. Evins

Street Address
5578 Morningdale Blvd.

City, State, Zip
Riverdale, NY 10893-4763

Telephone No.
(716) 843-4883

Name of Primary Beneficiary
Marty Evins

Street Address
5578 Morningdale Blvd.

City, State, Zip
Riverdale, NY 10893-4763

Policy No.
37-97849230-51

Policy Holder
University of Maine

Street Address
1432 Mainland Drive

City, State, Zip
Augusta, MA 86350-0563

Telephone No.
(207) 492-5130

Name of Primary Beneficiary
ARA Document Collection

Street Address
3200 State Street

City, State, Zip
Philadelphia, PA 65974-2145

Policy No.
08-67585179-56

Policy Holder
Plenty County Dept. of Education

Street Address
5503 Seville Avenue

City, State, Zip
Morningstown, ME 34678-2413

Telephone No.
(313) 994-8156

Name of Primary Beneficiary
Morningstown High School

Street Address
600 South Culver

City, State, Zip
Morningstown, ME 34678-2413

OSS/Simulations/Section IV
Filing Activities

Policy No.
42-27354400-47

Policy Holder
Robert G. Graham, Sr.

Street Address
5678 River Road

City, State, Zip
Oakville, OR 87765-2313

Telephone No.
(503) 676-7850

Name of Primary Beneficiary
Robert G. Graham, Jr.

Street Address
7425 West 105th St.

City, State, Zip
Birmingham, MS 55421-4327

Policy No.
42-27275891-52

Policy Holder
P A U

Street Address
4444 Englewood Road

City, State, Zip
Potsdown, OR 87938-3343

Telephone No.
(503) 468-8582

Name of Primary Beneficiary
Ronald McCaslin

Street Address
3025 St. Paul Avenue

City, State, Zip
Potsdown, OR 87938-3343

Policy No.
02-22847712-57

Policy Holder
Santas Cruz

Street Address
356 East 12th

City, State, Zip
Elsa, TX 73145-3776

Telephone No.
(817) 689-1183

Name of Primary Beneficiary
George Cruz

Street Address
1923 Casa Linda Way

City, State, Zip
San Juan, TX 71254-3529

Policy No.
19-75286483-48

Policy Holder
No. 9 Sports Shop

Street Address
95432 Hillside Dr.

City, State, Zip
Maysville, SD 56432-7754

Telephone No.
(605) 286-8449

Name of Primary Beneficiary
Mary May

Street Address
1415 May Terrace

City, State, Zip
Maysville, SD 56432-7754

Policy No.
02-22848181-53

Policy Holder
Number 5 Skating Rink

Street Address
3478 Rinkland Road

City, State, Zip
Topeka, KS 68938-9953

Telephone No.
(913) 633-4568

Name of Primary Beneficiary
Bill Belton

Street Address
7916 Johnson Street

City, State, Zip
Emporia, KS 68401-3342

Policy No.
48-86382748-58

Policy Holder
Brother Michael

Street Address
5640 Rapture Road

City, State, Zip
Spokane, WA 43205-4838

Telephone No.
(509) 994-2849

Name of Primary Beneficiary
Church of the Latter Day Saints

Street Address
50 Glory Road

City, State, Zip
Goergeland, GA 95388-3526

OSS/Simulations/Section IV
Filing Activities

Policy No.

48-86382780-49

Policy Holder

Mr. Juan de la Garza

Street Address

4589 Rail Terrace

City, State, Zip

Montealto, NV 83567-0954

Telephone No.

(702) 863-4918

Name of Primary Beneficiary

Alecia Juarez de la Garza

Street Address

4589 Rail Terrace

City, State, Zip

Montealto, NV 83567-0954

Policy No.

48-86372898-59

Policy Holder

Mrs. Eileen Demarco

Street Address

4545 Redvale Drive

City, State, Zip

Rivermont, MT 34568-6342

Telephone No.

(406) 913-5583

Name of Primary Beneficiary

Henry Demarco

Street Address

109 Valley View Lane

City, State, Zip

Liverpool, IA 70201-4256

Policy No.

00-52117572-45

Policy Holder

Texas State Dept. of Recreation

Street Address

3127 Hardrock Boulevard

City, State, Zip

Houston, TX 79887-8856

Telephone No.

(713) 468-8822

Name of Primary Beneficiary

Jason Foundation

Street Address

8930 Chimney Rock Road

City, State, Zip

Houston, TX 79872-8865

Policy No.

13-45828706-54

Policy Holder

The Addison Foundation

Street Address

321 Edvardo Drive

City, State, Zip

Springfield, GA 93578-5764

Telephone No.

(912) 846-2286

Name of Primary Beneficiary

Cassandra Addison

Street Address

8534 Lansing Road

City, State, Zip

Springfield, GA 93578-5764

Policy No.

13-45827801-50

Policy Holder

Rio Grande Cleaners

Street Address

82346 Holiday Road

City, State, Zip

Smithlane, MS 64680-4442

Telephone No.

(601) 268-5246

Name of Primary Beneficiary

Jack Anderson

Street Address

3925 5th Avenue

City, State, Zip

Smithlane, MS 64680-4442

Policy No.

37-97843891-60

Policy Holder

Juan Saldana

Street Address

4323 Valley Road

City, State, Zip

Longmount, VA 34589-3457

Telephone No.

(703) 318-9463

Name of Primary Beneficiary

Jon Jeffries

Street Address

130 West 15th

City, State, Zip

Houston, TX 79871-3457

MODERN MALL INSURANCE COMPANY

You have just returned from a two week vacation and find that you have been promoted to work in the record management department at Modern Mall Insurance Company. One of your many duties is to prepare a client file card for each new customer. Since this is the head office for the company, all client information is at one central location, your office. The Modern Mall Insurance Company has decided to computerize all their records.

Your supervisor is Mrs. Eileen Moore. She tells you that you will need to set up a database that includes the following fields:

Policy No.
Policyholder
Street Address
City, State, ZIP
Telephone No.
Name of Primary Beneficiary
Street Address
City, State, Zip
Geographic Division

She then wants you to enter all of the client records needed to be entered into the database for easy access. However, since most of the client records are already alphabetized on cards, you will only have to enter the new client records at this time.

After all of the new client records are entered:

1. Sort the list alphabetically, make a table and print a list of new policyholders including:

Policyholder's Name
Street Address
City, State, and ZIP

2. Sort the list according to policy numbers and print, using the same fields in #1, but place the policy number as the first column.

OSS/Simulations/Section IV
Filing Activities

3. Sort and list the policyholders according to geographic regions. Use the following fields:

Geographic Region
Policyholders Name
Street Address
City, State, and ZIP

4. Turn all printouts in to your supervisor.

OFFICE SUPPORT SYSTEMS

SECTION V

PROCESSING MAIL

SIMULATIONS

INSTRUCTIONS

This is a simulation prepared for Section V, Units 1 and 2 of the *Office Support Systems Curriculum Guide*. The simulation should be completed after the study of the reference materials in **Section V: Processing Mail**. Students should have studied and completed all written work for **Unit I--Incoming and Outgoing Mail** and **Unit II--Electronic Mail**. The competency tests following these units should determine whether or not the students are ready for the hands-on simulation.

The simulation is divided into two sections. The one-hour simulation should be completed for a one-semester course. The three-hour simulation should be completed for a one-year course.

This simulation contains the following:

One-Hour Simulation

- Sorting incoming mail and preparing it for distribution
- Selecting mail services
- Addressing envelopes and mailing labels

Three-Hour Simulation

- Sorting incoming mail and preparing it for distribution
- Selecting mail services
- Addressing envelopes and mailing labels
- Preparing a document for E-mail

Specific Instructions

One-Hour Simulation

1. Part 1 requires the students to have a paper clip and an envelope.
 - a. Have students cut apart the various types of mail and physically place them in order.
 - b. Then have them write the numbers of each piece of mail on the form provided along with the type of mail.
 - c. Have them place a paper clip on all of the materials and place the mail in an envelope with their name on it.
2. Part 2 requires the students to complete four of the situations and fill out appropriate forms.
3. Part 3 requires the students to address two envelopes (one large, one small), and complete four address labels. Select the names and the addresses from the list. You may copy the forms provided, cut paper for the students to use, or provide envelopes.

Three-Hour Simulation

1. Part 1 requires the students to have a paper clip and an envelope.
 - a. Have students cut apart the various types of mail and physically place them in order.
 - b. Then have them write the numbers of each piece of mail on the form provided along with the type of mail.
 - c. Have them place a paper clip on all of the materials and place the mail in an envelope with their name on it.
2. Part 2 requires the students to complete all ten of the situations and fill out appropriate forms.
3. Part 3 requires the students to address envelopes and mailing labels. Provide students with paper, cut in the size of envelopes; real envelopes; or copy the forms provided. Make sure that the address format follows the guidelines of the post office--capital letters and no punctuation.
4. Part 4 requires the students to prepare a document that will be sent by facsimile. It includes keying in and proofreading a document. The students will then fill in a form used as a cover sheet for the transmission.

ANSWERS

One Hour Simulation

Part 1

1.	5	11.	19
2.	4	12.	20
3.	12	13.	14
4.	18	14.	11
5.	9	15.	2
6.	7	16.	8
		17.	16
7.	3	18.	17
8.	1	19.	15
9.	10		
10.	13	20.	6

NOTE: The first answer and the last answer will always be the same; however, possible variations may occur. The mail should be in groups. The groups are as follows: 2-4; 5 and 6; 7-14; 15-17; and 18 and 19.

Part 2

Explanations of why these mail services were chosen may vary. Evaluate to the satisfaction of the instructor.

1. Express Mail
2. 3rd Class
3. Registered Mail
4. 1st Class

Part 3

Evaluated to the satisfaction of the instructor.

**OSS/Simulations/Section V
Answers**

Three-Hour Simulation

Part 1

1.	5	11.	19
2.	4	12.	20
3.	12	13.	14
4.	18	14.	11
5.	9	15.	2
6.	7	16.	8
		17.	16
7.	3	18.	17
8.	1	19.	15
9.	10		
10.	13	20.	6

NOTE: The first answer and the last answer will always be the same; however, possible variations may occur. The mail should be in groups. The groups are as follows: 2-4; 5 and 6; 7-14; 15-17; and 18 and 19.

Part 2

Explanations of why these mail services were chosen may vary. Evaluate to the satisfaction of the instructor.

- | | |
|--------------------|-------------------------------|
| 1. Express Mail | 6. Certified Mail |
| 2. 3rd Class | 7. Special Handling 1st Class |
| 3. Registered Mail | 8. 3rd Class |
| 4. 1st Class | 9. 1st Class |
| 5. C. O. D. | 10. 1st Class |

Parts 3 and 4

Evaluated to the satisfaction of the instructor.

OSS/Simulations/Section V
Evaluation Sheet

Name: _____

Grade: _____

Section: _____

Date: _____

PROCESSING MAIL SIMULATION EVALUATION SHEET

Received	Description
One-Hour Simulation	
_____	Sorting incoming mail
_____	Mail services
_____	Addressing envelopes
Comments:	
Three-Hour Simulation	
_____	Sorting incoming mail
_____	Mail services
_____	Addressing envelopes and mailing labels
_____	E-mail documents
Comments:	

Grades	
One-Hour Simulation	
Sorting incoming mail	_____
Mail services	_____
Addressing envelopes	_____
Grade Average:	_____
Grades	
Three-Hour Simulation	
Sorting incoming mail	_____
Mail services	_____
Addressing envelopes and mailing labels	_____
E-mail documents	_____
Grade Average:	_____

V & S MINI LOCK MANUFACTURING COMPANY

Part 1

Welcome to V & S Mini Lock Manufacturing Company. You have been hired as the new manager of the mail department. You will be personally handling the mail for Mr. Raymond Victor, president. A lot of mail comes into the company every day.

When you enter your office, you see that Mr. Victor's mail has arrived. You know that there is a specific way in which to organize his mail. The following is the mail Mr. Victor receives with this delivery:

The envelopes have already been opened except for those marked personal. Sort the mail into categories and then organize it appropriately.

Thank you letter

(1)

Mailgram

(5)

DALLAS TIMES HERALD

(2)

Parcel post package

(6)

Request for catalog

(3)

Letter

(7) PERSONAL

FEDERAL EXPRESS

(4)

PC CONCEPTS

(8)

OSS/Simulations/Section V
Processing Mail Activities
One-Hour Simulation

Letter from main office

(9) CONFIDENTIAL

**Reimbursement check for
overpayment**

(10)

**Resume from potential
employee**

(11)

Return receipt certified letter

(12)

Insurance bill

(13)

Purchasing invoice

(14)

Advertising brochure

(15)

**THE WALL STREET
JOURNAL**

(16)

SALE

(17)

Insured letter with check

(18)

Luncheon invitation

(19)

Magazine renewal

(20)

Part 2

After you have completed the organization of Mr. Victor's mail, you take it to his office. He thanks you for the delivery and hands you his outgoing mail.

When you return to your office, you set up your supplies for the outgoing mail. You get your mail log, envelopes, and verification slips. Mr. Victor requires every piece of his mail to have a verification slip completed. Last year a very important letter was not received by a supplier and he was unable to trace the letter because the employee had forgotten to record it in the mail log.

You must decide what type of mail and how to mail each of the following pieces of outgoing mail. You will need to give a brief description of why you selected each of these mail services. Your information will be recorded on the mail verification forms.

1. A business letter is being sent to a very important customer. Mr. Victor needs a response within 48 hours.
2. A catalog is being sent to a new customer.
3. An expensive ring is being returned to a supplier who recently visited the office. The ring is an heirloom and is worth \$5,000. The supplier is very grateful the ring was found.
4. A thank you letter to a supplier who recently found an error in our bill. He was given full credit and discount on his next order.

OSS/Simulations/Section V
Processing Mail Activities
One-Hour Simulation

NO: 1

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 2

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 3

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 4

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

OSS/Simulations/Section V

Processing Mail Activities

One-Hour Simulation

[illegible]

OSS/Simulations/Section V
Processing Mail Activities
One-Hour Simulation

Part 3

Mr. Victor has requested that you type the following addresses and mailing notations on the designated sizes of envelopes. Use the format specified by the post office--all capitals with no punctuation.

#10 envelopes

Best Locking Systems, Inc.
1150 Metric Avenue
Jollyville, GA 30051-7821
Special Delivery

Payless Locksmith
2725 South Congress
Garfield, AR 71052-6233
Attention: John Goldsmith

#6 envelope

Capitol City Steel
909 McPhaul
Manorville, TN 37422-9115

V & S Mini Lock Manufacturing Company
3425 East Carpenter Freeway West
Irving, TX 75458-3124

OSS/Simulations/Section V
Processing Mail Activities
One-Hour Simulations

V & S Mini Lock Manufacturing Company
3425 East Carpenter Freeway West
Irving, TX 75458-3124

V & S MINI LOCK MANUFACTURING COMPANY

Part 1

Welcome to V & S Mini Lock Manufacturing Company. You have been hired as the new manager of the mail department. You will be personally handling the mail for Mr. Raymond Victor, president. A lot of mail comes into the company every day.

When you enter your office, you see that Mr. Victor's mail has arrived. You know that there is a specific way in which to organize his mail. The following is the mail Mr. Victor receives with this delivery:

The envelopes have already been opened except for those marked personal. Sort the mail into categories and then organize it appropriately.

Thank you letter

(1)

Mailgram

(5)

DALLAS TIMES HERALD

(2)

Parcel post package
(6)

Request for catalog

(3)

Letter

(7) PERSONAL

FEDERAL EXPRESS

(4)

PC CONCEPTS

(8)

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

Letter from main office
(9) CONFIDENTIAL

Reimbursement check for
overpayment
(10)

Resume from potential
employee
(11)

Return receipt certified letter
(12)

Insurance bill
(13)

Purchasing invoice
(14)

Advertising brochure
(15)

THE WALL STREET
JOURNAL
(16)

SALE
(17)

Insured letter with check
(18)

Luncheon invitation
(19)

Magazine renewal
(20)

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

Part 2

After you have completed the organization of Mr. Victor's mail, you take it to his office. He thanks you for the delivery and hands you his outgoing mail.

When you return to your office, you set up your supplies for the outgoing mail. You get your mail log, envelopes, and verification slips. Mr. Victor requires every piece of his mail to have a verification slip completed. Last year a very important letter was not received by a supplier and he was unable to trace the letter because the employee had forgotten to record it in the mail log.

You must decide what type of mail and how to mail each of the following pieces of outgoing mail. You will need to give a brief description of why you selected each of these mail services. Your information will be recorded on the mail verification forms.

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

1. A business letter is being sent to a very important customer. Mr. Victor needs a response within 48 hours.
2. A catalog is being sent to a new customer.
3. An expensive ring is being returned to a supplier who recently visited the office. The ring is an heirloom and is worth \$5,000. The supplier is very grateful the ring was found.
4. A thank you letter to a supplier who recently found an error in our bill. He was given full credit and discount on his next order.
5. Samples of our merchandise need to be sent to a new customer. The customer has agreed to pay the charges.
6. Mr. Victor wants to be sure the client gets a license for the new product.
7. A set of floppy disks containing the monthly reports from each department are being sent to the main office in Atlanta, Georgia. Care needs to be taken so that the disks are not damaged.
8. More than 15,000 special sales advertisements are being sent to all of our customers.
9. A letter of congratulations has been sent along with a check for \$500 to a salesman that has been promoted to a new position in our Atlanta office.
10. This month's invoices have been released for mailing to all our credit customers.

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

NO: 1

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 2

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 3

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 4

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

NO: 5

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 6

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 7

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

NO: 8

MAIL VERIFICATION

Description of item mailed: _____

☐	First Class	☐	Second Class	Special handling instructions:
☐	Third Class	☐	Fourth Class	

Your comments or reasons for mailing this item in this particular way:

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

NO: 9

MAIL VERIFICATION

Description of item mailed: _____

☐
☐

First Class
Third Class

☐
☐

Second Class
Fourth Class

Special handling instructions:

Your comments or reasons for mailing this item in this particular way:

NO: 10

MAIL VERIFICATION

Description of item mailed: _____

☐
☐

First Class
Third Class

☐
☐

Second Class
Fourth Class

Special handling instructions:

Your comments or reasons for mailing this item in this particular way:

Processing Mail Activities
Three-Hour Simulations

Part 3

During a recent mail-out, several labels fell off the envelopes. Make out address labels for the following handwritten addresses.

Zesco Computer Supplies
7404 San Gabriel
San Gabriel, CA 91778-1234

Safety Lock Corporation
901 West Ben Whitey Boulevard
Greenville, SC 29466-9872

Big Apple Inn
6707 Burnet Road
Austin, TX 78701-4422

Rolfe Metal Works
404 Baylor Street
Waco, TX 76707-3289

Jefferson Airlines
5521 Highway 290 West
Houston, TX 77082-7851

Koreem's Decorator Door
8015 Shoal Creek
St. Francisville, NY 13901-9871

Deco Trunk
2021 Guadeloupe
Albuquerque, NM 87122-5199

Live Oak Clinic
5319 Live Oak
South Sulphur, MI 49017-5022

Lock Supplies
8700 St. Arthur Parkway
Minneapolis, MN 55431-4134

Argus City Banner
3115 Mance Road
Argus, TN 37420-1055

**Processing Mail Activities
Three-Hour Simulations**

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

Mr. Victor has requested that you type the following addresses and mailing notations on the designated sizes of envelopes. Use the format specified by the post office--all capitals with no punctuation.

#10 ENVELOPES

Best Locking Systems, Inc.
1150 Metric Avenue
Jollyville, GA 30051-7821
Special Delivery

LOC DOC
509 Rio Grande
Beeville, MS 39667-7651

Payless Locksmith
2725 South Congress
Garfield, AR 71952-6233
Attention: John Goldsmith

Lockothon Equipment
2006 Garden Street
Pflugerville, NY 13977-4499

A-1 Lock Company
13945 Research Boulevard
Georgetown, CA 91722-5134

Aardvark Lock and Key
2700 Mercedes
Lakeway, FL 32200-9876

Westbrook Metals
7303 Burleson Street
Round Rock, TX 75499

Austen Metal Company
511 South St. Elmo
Liberty Hill, TN 37455-3388

#6 ENVELOPES

Capitol City Steel
909 McPhaul
Manorville, TN 37422-9115

Woven Metal Products
401 Isom
Levander, WA 98442-3649

V & S Mini Lock Manufacturing Company
3425 East Carpenter Freeway West
Irving, TX 75458-3124

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

V & S Mini Lock Manufacturing Company
3425 East Carpenter Freeway West
Irving, TX 75458-3124

V & S Mini Lock Manufacturing Company
3425 East Carpenter Freeway West
Irving, TX 75458-3124

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

Part 4

Mr. Victor's secretary is out this week and he would like you to key in this information and send it over to be faxed along with a properly filled in cover sheet.

Fax information:

TO: Howard Johnson--Johnson Lock, Inc. FAX # 214-886-5916

FROM: Raymond Victor, President

No. of Pages: (You determine after you have keyed in information)

Questions are referred to:

Raymond Victor, (214)438-3822, FAX (214)438-3741

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

V & S Mini Lock Manufacturing Company
3425 East Carpenter Freeway West
Irving, TX 75458

FAX TRANSMITTAL COVER SHEET

TO: _____

FROM: _____

Number of pages
including this cover sheet: _____

**If there are any questions regarding
this transaction, please contact:**

Name Phone No. FAX No.

OSS/Simulations/Section V
Processing Mail Activities
Three-Hour Simulations

TO: Howard Johnson--Johnson Lock, Inc.

FROM: Raymond Victor, President

We would like to remind you that Professional Selling Skills Program will be held in Ocean City, New Jersey this year.

As you may have already been notified, we are going to start the program a half-hour earlier than originally scheduled. So, we'll have a continental breakfast set up outside Room 804 beginning at 7:30 Monday morning and we'll start the program promptly at 8:00. However, we'll be ending on Thursday at 3:00 instead of 4:00 p.m.

If you're interested in doing some bicycle riding on the boardwalk before breakfast, check with the front desk. We have bicycles reserved for our group and have made arrangements for the rental charges to be master billed.

If you have any questions or need any help in getting settled, please don't hesitate to call Dave Katz in his room.

Have a safe trip and we'll see you on Monday morning.

OFFICE SUPPORT SYSTEMS

SECTION VI

BUSINESS OPERATIONS

NO SIMULATIONS

OFFICE SUPPORT SYSTEMS

SECTION VII

FINANCIAL MANAGEMENT

SIMULATIONS

INSTRUCTIONS

This is a simulation prepared for Section I, Units 1 and 2 of the *Office Support Systems Curriculum Guide*. The simulation should be completed after the study of the reference materials in **Section I: Financial Management**. Students should have studied and completed all written work for **Unit I--Checking Account** and **Unit II--Payroll and Tax Reporting**. The competency tests following these units should determine whether or not the students are ready for the hands-on simulation.

The simulation is divided into two sections. The one-hour simulation should be completed for a one-semester course. The three-hour simulation should be completed for a one-year course.

This simulation can be performed on any electronic calculator or computer key pad using a a desktop program with this feature.

This simulation contains the following:

One-Hour Simulation

- Personal check writing
- Payroll activity

Three-Hour Simulation

- Figuring hours worked
- Completing net income
- Preparing payroll checks
- Preparing payroll record

ANSWERS

CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	AMOUNT OF CHECK	✓	AMOUNT OF DEPOSIT	BALANCE FORWARD	
						Check or Dep.	Bal.
	8/1	To Deposit			✓ 150 00	150 00	
		For Opening account				150 00	
1	8/29	To High School	12 00	✓		12 00	
		For parking permit				138 00	
2	8/30	To High School	35 00			35 00	
		For Yearbook				103 00	
3	8/30	To High School	8 00	✓		8 00	
		For I.D. card				95 00	
	8/31	To Deposit			✓ 125 89	125 89	
		For				220 89	
4	8/31	To Mike's Service Station	18 98	✓		18 98	
		For gas				201 91	
5	8/31	To Uptown Grocery	23 89			23 89	
		For party smokes				178 02	
	8/31	To Deposit			69 70	69 70	
		For				247 72	
	9/1	To Service Chg.	5 00	✓		5 00	
		For				242 72	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	

OSS/Simulations/Section VII
Answers

No. 1	
PAY TO THE ORDER OF <u>High School</u>	<u>Aug 29</u> 19 <u>90</u> 88-335 1119
<u>Twelve and 00/100</u>	\$ <u>12.00</u>
DOLLARS	
The First National Bank	
<u>Student</u>	
⑆111903355⑆	

No. 2	
PAY TO THE ORDER OF <u>High School</u>	<u>Aug 30</u> 19 <u>90</u> 88-335 1119
<u>Thirty five and 00/100</u>	\$ <u>35.00</u>
DOLLARS	
The First National Bank	
<u>Student</u>	
⑆111903355⑆	

No. 3	
PAY TO THE ORDER OF <u>High School</u>	<u>Aug 30</u> 19 <u>90</u> 88-335 1119
<u>Eight and 00/100</u>	\$ <u>8.00</u>
DOLLARS	
The First National Bank	
<u>Student</u>	
⑆111903355⑆	

No. 4

PAY TO THE ORDER OF Mike's Service Station Aug 31 1990 88-335
1119
\$ 18.98

Eighteen and 98/100 DOLLARS

The First National Bank Student

⑆111903355⑆

No. 5

Aug 31 19 90 88-335
1119

PAY TO THE ORDER OF Uptown Grocery \$ 23.89

Twenty three and 89/100 DOLLARS

The First National Bank

Student

001119033550

No. _____

_____ 19____ ⁸⁶⁻³³⁵
1119

DAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS

The First National Bank

⑆111903355⑆

OSS/Simulations/Section VII
Answers

DEPOSITED WITH
The First National Bank

ACCOUNT NUMBER

NAME Student Aug 1, 1990

ADDRESS _____

CITY _____

FOR BANK USE open account

Sign Here For Less Cash
CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT
SUBJECT TO THE TERMS AND CONDITIONS OF THIS BANK'S
COLLECTION AGREEMENT

CURRENCY	150	00
COIN		
CHECKS		
TOTAL	150	00
LESS CASH RECEIVED		
USE BACK SIDE FOR LISTING ADDITIONAL CHECKS		
NET DEPOSIT	150	00

DEPOSITED WITH
The First National Bank

ACCOUNT NUMBER

NAME Student Aug 31, 1990

ADDRESS _____

CITY _____

FOR BANK USE

Sign Here For Less Cash
CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT
SUBJECT TO THE TERMS AND CONDITIONS OF THIS BANK'S
COLLECTION AGREEMENT

CURRENCY	50	00
COIN		89
CHECKS <u>Yazhel</u>	75	00
TOTAL	125	89
LESS CASH RECEIVED		
USE BACK SIDE FOR LISTING ADDITIONAL CHECKS		
NET DEPOSIT	125	89

DEPOSITED WITH
The First National Bank

ACCOUNT NUMBER

NAME Student Aug 31, 1990

ADDRESS _____

CITY _____

FOR BANK USE

Sign Here For Less Cash
CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT
SUBJECT TO THE TERMS AND CONDITIONS OF THIS BANK'S
COLLECTION AGREEMENT

CURRENCY		
COIN		
CHECKS <u>LYKE Radio</u>	69	70
TOTAL	69	70
LESS CASH RECEIVED		
USE BACK SIDE FOR LISTING ADDITIONAL CHECKS		
NET DEPOSIT	69	70

The First National Bank

ON	YOUR BALANCE WAS	NO.	WE SUBTRACTED CHECKS TOTALING	LESS ACTIVITY CHARGE	NO.	WE ADDED DEPOSITS OF	MAKING YOUR PRESENT BALANCE
8-31	0	3	\$38.98	\$5.00	2	\$275.89	\$231.91

DATE	CHECKS		DEPOSITS	BALANCE
8-1			\$150.00	\$150.00
8-29	1	\$12.00		138.00
8-30	3	8.00		130.00
8-31			125.89	255.89
8-31	4	18.98		236.91
8-31	S	5.00		231.91

PLEASE EXAMINE AT ONCE, if no error is reported within ten days, the account will be considered correct. PLEASE NOTIFY BANK IN WRITING OF CHANGE OF ADDRESS.
D = AUTOMATIC DRAFT I = INTEREST DEPOSIT M = DEBIT MEMO OD = OVERDRAFT R = REVERSING ENTRY S = SERVICE CHARGE

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OSS/Simulations/Section VII
Answers

2.	Gross salary	\$ 240.00
	FICA (6.65%)	15.96
	Income tax	41.40
	NET INCOME	\$ 182.64
3.	Gross salary	\$ 200.00
	FICA (6.65%)	13.30
	Income tax	30.60
	NET INCOME	\$ 182.64
4.	Weekly net income	\$ 231.92
	Gross income for summer	\$2880.00
	Net income for summer	\$2087.28

OSS/Simulations/Section VII
Answers

WEEKLY TIME CARD									
Name		Amy Brown							
Employee No.		12							
Soc. Sec. No.		234-89-7890							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M	7:30			5			8	1.5	
T	8	10	1	8			8	1	
W	7			4			8	1	
T	7			8			8	4	
F	7			4			8	1	
S									
S									
TOTAL HOURS							40	8.5	

WEEKLY TIME CARD									
Name		Phil Jones							
Employee No.		13							
Soc. Sec. No.		123-89-0987							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M			3	10			7		
T			1	8			7		
W			12	7			7		
T							0		
F			12	7			7		
S			12	7			7		
S			12	4			4		
TOTAL HOURS							39		

WEEKLY TIME CARD									
Name		Gene Smith							
Employee No.		14							
Soc. Sec. No.		987-87-4576							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M	7	12	1	6			8	2	
T	9			7			8	2	
W	8			4			8		
T							0		
F	8			4			8		
S	8			4			8		
S									
TOTAL HOURS							40	4	

WEEKLY TIME CARD									
Name		Susie Snyder							
Employee No.		15							
Soc. Sec. No.		456-76-7697							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M	7			4			8	1	
T	7			4			8	1	
W	7			4			8	1	
T									
F	7			6			8	3	
S	7			5			8	2	
S									
TOTAL HOURS							40	8	

OSS/Simulations/Section VII
Answers

WEEKLY TIME CARD									
Name		Carlos Garcia							
Employee No.		16							
Soc. Sec. No.		465-87-4532							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M			1			10	8	1	
T			1			9	8		
W									
T			1			11	8	2	
F			1			11	8	2	
S			1			10	8	1	
S									
TOTAL HOURS							40	6	

WEEKLY TIME CARD									
Name		James Greenwood							
Employee No.		17							
Soc. Sec. No.		345-74-9876							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M					4	11	7		
T					4	11	7		
W					4	11	7		
T							0		
F					4	11	7		
S					4	8	4		
S					4	11	7		
TOTAL HOURS							39		

WEEKLY TIME CARD									
Name		Regina Combs							
Employee No.		18							
Soc. Sec. No.		568-42-6521							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M	8	12	1	5			8		
T	8	12	1	5			8		
W	8	12	1	5			8		
T	8	12	1	5			8		
F	8	12	1	5			8		
S									
S									
TOTAL HOURS							40		

WEEKLY TIME CARD									
Name		Mary Towers							
Employee No.		19							
Soc. Sec. No.		468-21-8977							
For Week Ending		September 18							
	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS	
	In	Out	In	Out	In	Out			
M			5			10	5		
T			5			10	5		
W			5			10	5		
T			5			10	5		
F			5			10	5		
S									
S									
TOTAL HOURS							25		

Employee's Earnings Record

NAME Amy Brown ADDRESS 1500 Chestnut
 SINGLE _____ MARRIED X Mt. Vernon, TX 75457
 SOCIAL SECURITY NO. 234-89-7890 NO. OF EXEMPTIONS 3
 DATE HIRED 2/25/80 AGE 28
 WAGES 6.50 O/T WAGE 9.75 POSITION Technician
 TERMINATION DATE _____ REASON FOR LEAVING _____

First Quarter

WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1 <u>9/18</u>	<u>342</u>	<u>88</u>	<u>22</u>	<u>80</u>	<u>43</u>	<u>30</u>						
2												
3												
4												
5												
6												

Employee's Earnings Record

NAME Phil Jones ADDRESS 2445 E. Main
 SINGLE _____ MARRIED X Mt. Vernon, TX 75457
 SOCIAL SECURITY NO. 123-89-9087 NO. OF EXEMPTIONS 4
 DATE HIRED 11/5/79 AGE 42
 WAGES 6.75 O/T WAGE 10.13 POSITION Computer Technician
 TERMINATION DATE _____ REASON FOR LEAVING _____

First Quarter

WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1 <u>9/18</u>	<u>263</u>	<u>25</u>	<u>17</u>	<u>51</u>	<u>23</u>	<u>10</u>						
2												
3												
4												
5												
6												

Employee's Earnings Record											
NAME		Gene Smith				ADDRESS		8966 W. Grove			
SINGLE		X		MARRIED				Mt. Pleasant, TX 75477			
SOCIAL SECURITY NO.		987-87-4576				NO. OF EXEMPTIONS		1			
DATE HIRED		8/22/78				AGE		45			
WAGES		7.75		O/T WAGE		11.63		POSITION		Supervisor	
TERMINATION DATE						REASON FOR LEAVING					
First Quarter											
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT
1 9/18	356	52	23	71	70	30					
2											
3											
4											
5											
6											

Employee's Earnings Record											
NAME		Susie Snyder				ADDRESS		504 N. 1st. St.			
SINGLE				MARRIED		X		Paris, TX 75460			
SOCIAL SECURITY NO.		456-76-7697				NO. OF EXEMPTIONS		2			
DATE HIRED		8/86				AGE		25			
WAGES		6.35		O/T WAGE		9.53		POSITION		Typist	
TERMINATION DATE						REASON FOR LEAVING					
First Quarter											
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT
1 9/18	330	24	21	96	45	50					
2											
3											
4											
5											
6											

Employee's Earnings Record												
NAME <u>Carlos Garcia</u>		ADDRESS <u>3671 2nd St.</u>										
SINGLE _____ MARRIED <u>3</u>		<u>Sulphur Springs, TX 75433</u>										
SOCIAL SECURITY NO. <u>465-87-4532</u>		NO. OF EXEMPTIONS <u>3</u>										
DATE HIRED <u>9/4/89</u>		AGE <u>35</u>										
WAGES <u>6.35</u> O/T WAGE <u>9.53</u>		POSITION <u>Lineman</u>										
TERMINATION DATE _____		REASON FOR LEAVING _____										
First Quarter												
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1 <u>9/18</u>	<u>311</u>	<u>1</u>	<u>20</u>	<u>69</u>	<u>37</u>	<u>00</u>						
2												
3												
4												
5												
6												

Employee's Earnings Record												
NAME <u>James Greenwood</u>		ADDRESS <u>1245 W. Randle Rd.</u>										
SINGLE <u>X</u> MARRIED _____		<u>Mt. Vernon, TX 75457</u>										
SOCIAL SECURITY NO. <u>345-74-9876</u>		NO. OF EXEMPTIONS <u>1</u>										
DATE HIRED <u>3/29/88</u>		AGE <u>22</u>										
WAGES <u>6.75</u> O/T WAGE <u>10.13</u>		POSITION <u>Lineman</u>										
TERMINATION DATE _____		REASON FOR LEAVING _____										
First Quarter												
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1 <u>9/18</u>	<u>263</u>	<u>25</u>	<u>17</u>	<u>51</u>	<u>44</u>	<u>20</u>						
2												
3												
4												
5												
6												

Employee's Earnings Record												
NAME <u>Regina Combs</u>				ADDRESS <u>1234 W. Cedar</u>								
SINGLE ☒ MARRIED ☐				Mt. Vernon, TX 75457								
SOCIAL SECURITY NO. <u>568-42-6521</u>				NO. OF EXEMPTIONS <u>1</u>								
DATE HIRED <u>2/21/88</u>				AGE <u>20</u>								
WAGES <u>6.50</u> O/T WAGE <u>9.25</u>				POSITION <u>Receptionist</u>								
TERMINATION DATE _____				REASON FOR LEAVING _____								
First Quarter												
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1 <u>9/18</u>	<u>260</u>	<u>00</u>	<u>17</u>	<u>29</u>	<u>44</u>	<u>20</u>						
2												
3												
4												
5												
6												

Employee's Earnings Record												
NAME <u>Mary Towers</u>				ADDRESS <u>2252 Concord</u>								
SINGLE ☒ MARRIED ☐				Mt. Vernon, TX 75457								
SOCIAL SECURITY NO. <u>468-21-8977</u>				NO. OF EXEMPTIONS <u>1</u>								
DATE HIRED <u>3/9/88</u>				AGE <u>22</u>								
WAGES <u>8.25</u> O/T WAGE <u>12.63</u>				POSITION <u>Computer Technician</u>								
TERMINATION DATE _____				REASON FOR LEAVING _____								
First Quarter												
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1 <u>9/18</u>	<u>206</u>	<u>25</u>	<u>13</u>	<u>72</u>	<u>29</u>	<u>10</u>						
2												
3												
4												
5												
6												

OSS/Simulations/Section VII
Answers

Amy Brown		9/18	48.5	260.00	82.88	342.88	43.30	22.80		66.10	276.78
PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY		
		EARNINGS			DEDUCTIONS						

Detach and Retain this Statement

TO THE ORDER OF Amy Brown DATE 9/20 \$ 276.78

PAY Two hundred seventy six and 78/100 — DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

Phil Jones		9/18	39	263.25		263.25	23.10	17.51		40.61	222.64
PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY		
		EARNINGS			DEDUCTIONS						

Detach and Retain this Statement

TO THE ORDER OF Phil Jones DATE 9/20 \$ 222.64

PAY Two hundred twenty two and 64/100 — DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

OSS/Simulations/Section VII
Answers

Gene Smith		9/18	44	310.00	46.52	356.52	70.30	23.71		94.01	262.51
NAME		PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
				EARNINGS			DEDUCTIONS				

Detach and Retain this Statement

TO THE ORDER OF Gene Smith DATE 9/20 \$ 262.51

PAY Two hundred sixty two and 51/100 DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

Susie Snyder		9/18	48	254.00	76.24	330.24	45.50	21.96		67.46	262.78
NAME		PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
				EARNINGS			DEDUCTIONS				

Detach and Retain this Statement

TO THE ORDER OF Susie Snyder DATE 9/20 \$ 262.78

PAY Two hundred sixty two and 78/100 DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

OSS/Simulations/Section VII
Answers

Carlos Garcia	9/8	46	254.00	57.18	311.18	37.00	20.69		57.69	253.49
NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
			EARNINGS				DEDUCTIONS			

Detach and Retain this Statement

TO THE ORDER OF Carlos Garcia DATE 9/20 \$ 253.49

PAY Two hundred fifty three and 49/100 - DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

James Greenwood	9/8	39	263.25		263.25	44.20	17.51		61.71	201.54
NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
			EARNINGS				DEDUCTIONS			

Detach and Retain this Statement

TO THE ORDER OF James Greenwood DATE 9/20 \$ 201.54

PAY Two hundred one and 54/100 - DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

OSS/Simulations/Section VII
Answers

Regina Combs		9/18	40	260.00		260.00	44.20	17.29		61.49	198.51
NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY	
			EARNINGS			DEDUCTIONS					

Detach and Retain this Statement

TO THE ORDER OF Regina Combs DATE 9/20 \$ 198.51

PAY One hundred ninety eight and 51/100 DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

Mary Towers		9/18	25	206.25		206.25	29.10	13.72		42.82	163.43
NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY	
			EARNINGS			DEDUCTIONS					

Detach and Retain this Statement

TO THE ORDER OF Mary Towers DATE 9/20 \$ 163.43

PAY One hundred sixty three and 43/100 DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
1000 Main St.
Ft. Worth, TX 75422

AUTHORIZED SIGNATURE

OSS/Simulations/Section VII
Evaluation Sheet

Name: _____

Grade: _____

Section: _____

Date: _____

FINANCIAL MANAGEMENT SIMULATION EVALUATION SHEET

Received	Description
One-Hour Simulation	
	Checking Account
_____	Write personal checks
_____	Make deposit
_____	Record properly in checkbook
_____	Reconcile bank statement
	Payroll Activity
_____	Net pay for 25 hours
_____	Net pay for 25 hours
_____	Net pay for 20 hours
_____	Net pay for 40 hours
_____	Gross pay for summer
_____	Net pay for summer
Comments:	
Grades	
One-Hour Simulation	
Check Writing	_____
Payroll Activity	_____
Grade Average:	_____

Received	Description
Three-Hour Simulation	
_____	Figure Hours
_____	Compute Net Income
_____	Prepare Checks
_____	Payroll Record
Comments:	

Grades	
Three-Hour Simulation	
Figure Hours	_____
Compute Net Income	_____
Prepare Checks	_____
Payroll Record	_____
Grade Average:	_____

LYKE Radio Station

You have just been hired as a receptionist for the LYKE Radio Station with the chance to advance to the position of Scheduler. You are beginning work at the salary of \$8.00 per hour. Since you are still in school, you will only be working 25 to 30 hours each week. Since you have started working, your parents have encouraged you to open a checking account so that you will be able to keep better track of your money and also be able to write checks out for some of your personal spending.

You opened your account with a balance of \$150.00 on August 1. Once school registration starts you begin to see how expensive school is and find that you will need to write the following checks and also make the following deposits.

1. Using your check blanks and deposit slips, enter the following transactions:

August 29	You register for school and find that you need to write out a check for \$12.00 for a parking permit. Make the check payable to your high school.
August 30	You write out a check for \$35.00 to pay for your yearbook. Make the check payable to your high school.
August 30	You write out a check for \$8.00 to your high school to pay for an I.D.
August 31	You deposit three \$10 bills, one \$20 bill, and 89 cents in change. You also deposit a check from your dad for \$75 for your allowance for the month of August.
August 31	You write a check for \$18.98 for gas at Mike's Service Station.
August 31	You write a check at Uptown Grocery, for snack items for a party, in the amount of \$23.89.
August 31	You deposit your paycheck for \$69.70.

OSS/Simulations/Section VII
Financial Management Activities
One-Hour Simulation

September 1

You receive your bank statement and you need to reconcile your bank statement using the form provided. While you are working on your statement, you find that the check you wrote out for the yearbook has not come in, as well as the one written to Uptown Grocery. You also find that your final deposit was not included in the statement. The balance on your statement indicates that you have \$231.91 in the bank. You are charged a service charge of \$5.00.

2. This week you are going to work 30 hours since you will be out of school for a teachers' work day. You want to determine your net pay:

Gross Salary	\$ _____
FICA (6.65%)	\$ _____
Income Tax	\$ _____
NET PAY	\$ _____

3. Beginning next week, you will be working 25 hours per week for the rest of the school year. You want to determine your net pay.

Gross Salary	\$ _____
FICA (6.65%)	\$ _____
Income Tax	\$ _____
NET PAY	\$ _____

4. This summer you will be able to work 40 hours per week for the entire summer. You want to determine your weekly net pay. Then determine how much you will earn this summer if you are able to work 9 weeks.

Weekly net pay	\$ _____
Gross amount for the summer	\$ _____
Net amount for the summer	\$ _____

OSS/Simulations/Section VII
Financial Management Activities
One-Hour Simulation

CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	AMOUNT OF CHECK	✓	AMOUNT OF DEPOSIT	BALANCE FORWARD	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	
		To				Check or Dep.	
		For				Bal.	

OSS/Simulations/Section VII
Financial Management Activities
One-Hour Simulation

No.	
_____ 19__	88-335 1119
DAY TO THE ORDER OF _____ \$ _____	
_____ DOLLARS	
<i>The First National Bank</i>	
⑆111903355⑆	

No.	
_____ 19__	88-335 1119
DAY TO THE ORDER OF _____ \$ _____	
_____ DOLLARS	
<i>The First National Bank</i>	
⑆111903355⑆	

No.	
_____ 19__	88-335 1119
DAY TO THE ORDER OF _____ \$ _____	
_____ DOLLARS	
<i>The First National Bank</i>	
⑆111903355⑆	

OSS/Simulations/Section VII
Financial Management Activities
One-Hour Simulation

No.	
DAY TO THE ORDER OF	_____ 19____ ⁸⁸⁻³³⁵ 1119
S _____	
DOLLARS	
<i>The First National Bank</i>	
⑆111903355⑆	

No.	
DAY TO THE ORDER OF	_____ 19____ ⁸⁸⁻³³⁵ 1119
S _____	
DOLLARS	
<i>The First National Bank</i>	
⑆111903355⑆	

No.	
DAY TO THE ORDER OF	_____ 19____ ⁸⁸⁻³³⁵ 1119
S _____	
DOLLARS	
<i>The First National Bank</i>	
⑆111903355⑆	

OSS/Simulations/Section VII

Financial Management Activities

One-Hour Simulation

CURRENCY		
COIN		
CHECKS		
TOTAL		
LESS CASH RECEIVED		
USE BACK SIDE FOR LISTING ADDITIONAL CHECKS		NET DEPOSIT ▶

DEPOSITED WITH
The First National Bank

ACCOUNT NUMBER _____ 19 ____

NAME _____

ADDRESS _____

CITY _____

FOR BANK USE ▶

[illegible][illegible]

The First National Bank

ON	YOUR BALANCE WAS	NO	WE SUBTRACTED CHECKS TOTALING	LESS ACTIVITY CHARGE	NO	WE ADDED DEPOSITS OF	MAKING YOUR PRESENT BALANCE
8-31	0	3	\$38.98	\$5.00	2	\$275.89	\$231.91

DATE	CHECKS		DEPOSITS	BALANCE
8-1			\$150.00	\$150.00
8-29	1	\$12.00		138.00
8-30	3	8.00		130.00
8-31			125.89	255.89
8-31	4	18.98		236.91
8-31	S	5.00		231.91

PLEASE EXAMINE AT ONCE, if no error is reported within ten days, the account will be considered correct.

PLEASE NOTIFY BANK IN WRITING OF CHANGE OF ADDRESS.

D = AUTOMATIC DRAFT

I = INTEREST DEPOSIT

M = DEBIT MEMO

OD = OVERDRAFT

R = REVERSING ENTRY

S = SERVICE CHARGE

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LYKE Radio Station

You have just been hired as a clerk in the accounting department for the LYKE Radio Station. You are beginning work at the salary of \$8.00 per hour. One of your responsibilities is to compute the time cards for the employees. Your co-worker has completed some of the cards but you will need to complete the rest. Follow the instructions below:

1. Figure the number of hours for each of the employees using the time cards provided by your supervisor.
2. Compute the salary for each of the employees at LYKE.
 - Use 6.65% to compute the FICA deduction.
 - Use the sample federal income tax tables to determine the amount of federal income tax.
3. Type a check out for each employee being very careful not to make mistakes.
4. Complete an Individual Payroll Record form for each employee.

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

WEEKLY TIME CARD

Name Amy Brown
Employee No. 12
Soc. Sec. No. 234-89-7890
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M	7:30			5				
T	8	10	1	8				
W	7			4				
T	7			8				
F	7			4				
S								
S								
TOTAL HOURS								

WEEKLY TIME CARD

Name Phil Jones
Employee No. 13
Soc. Sec. No. 123-89-0987
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M			3	10				
T			1	8				
W			12	7				
T								
F			12	7				
S			12	7				
S			12	4				
TOTAL HOURS								

WEEKLY TIME CARD

Name Gene Smith
Employee No. 14
Soc. Sec. No. 987-87-4576
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M	7	12	1	6				
T	9			7				
W	8			4				
T								
F	8			4				
S	8			4				
S								
TOTAL HOURS								

WEEKLY TIME CARD

Name Susie Snyder
Employee No. 15
Soc. Sec. No. 456-76-7697
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M	7			4				
T	7			4				
W	7			4				
T								
F	7			6				
S	7			5				
S								
TOTAL HOURS								

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

WEEKLY TIME CARD

Name Carlos Garcia
Employee No. 16
Soc. Sec. No. 465-87-4532
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M			1			10		
T			1			9		
W								
T			1			11		
F			1			11		
S			1			10		
S								
TOTAL HOURS								

WEEKLY TIME CARD

Name James Greenwood
Employee No. 17
Soc. Sec. No. 345-74-9876
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M					4	11		
T					4	11		
W					4	11		
T								
F					4	11		
S					4	8		
S					4	11		
TOTAL HOURS								

WEEKLY TIME CARD

Name Regina Combs
Employee No. 18
Soc. Sec. No. 568-42-6521
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M	8	12	1	5				
T	8	12	1	5				
W	8	12	1	5				
T	8	12	1	5				
F	8	12	1	5				
S								
S								
TOTAL HOURS								

WEEKLY TIME CARD

Name Mary Towers
Employee No. 19
Soc. Sec. No. 468-21-8977
For Week Ending September 18

	MORNING		AFTERNOON		NIGHT		REGULAR HOURS	OVERTIME HOURS
	In	Out	In	Out	In	Out		
M			5			10		
T			5			10		
W			5			10		
T			5			10		
F			5			10		
S								
S								
TOTAL HOURS								

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

Employee's Earnings Record											
NAME <u>Amy Brown</u>				ADDRESS <u>1500 Chestnut</u>							
SINGLE _____ MARRIED <u>X</u>				Mt. Vernon, TX 75457							
SOCIAL SECURITY NO. <u>234-89-7890</u>				NO. OF EXEMPTIONS <u>3</u>							
DATE HIRED <u>2/25/80</u>				AGE <u>28</u>							
WAGES <u>6.50</u> O/T WAGE <u>9.75</u>				POSITION <u>Technician</u>							
TERMINATION DATE _____				REASON FOR LEAVING _____							
First Quarter											
WEEK ENDING	TOTAL WAGES	SOC. SEC. TAX	FEDERAL WITH HOLDING TAX	HEALTH INS.	DIRECT SAVINGS	RETIREMENT					
1											
2											
3											
4											
5											
6											

Employee's Earnings Record											
NAME <u>Phil Jones</u>				ADDRESS <u>2445 E. Main</u>							
SINGLE _____ MARRIED <u>M</u>				Mt. Vernon, TX 75457							
SOCIAL SECURITY NO. <u>123-89-9087</u>				NO. OF EXEMPTIONS <u>4</u>							
DATE HIRED <u>11/5/79</u>				AGE <u>42</u>							
WAGES <u>6.75</u> O/T WAGE <u>10.13</u>				POSITION <u>Computer Technician</u>							
TERMINATION DATE _____				REASON FOR LEAVING _____							
First Quarter											
WEEK ENDING	TOTAL WAGES	SOC. SEC. TAX	FEDERAL WITH HOLDING TAX	HEALTH INS.	DIRECT SAVINGS	RETIREMENT					
1											
2											
3											
4											
5											
6											

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

Employee's Earnings Record											
NAME		<u>Gene Smith</u>				ADDRESS		<u>8966 W. Grove</u>			
SINGLE		<u>X</u>		MARRIED				<u>Mt. Pleasant, TX 75477</u>			
SOCIAL SECURITY NO.						<u>987-87-4576</u>		NO. OF EXEMPTIONS		<u>1</u>	
DATE HIRED						<u>8/22/78</u>		AGE		<u>45</u>	
WAGES						<u>7.75</u>		O/T WAGE		<u>11.63</u>	
TERMINATION DATE								POSITION		<u>Supervisor</u>	
								REASON FOR LEAVING			
First Quarter											
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT
1											
2											
3											
4											
5											
6											

Employee's Earnings Record											
NAME		<u>Susie Snyder</u>				ADDRESS		<u>504 N. 1st St.</u>			
SINGLE				MARRIED		<u>X</u>		<u>Paris, TX 75460</u>			
SOCIAL SECURITY NO.						<u>456-76-7697</u>		NO. OF EXEMPTIONS		<u>2</u>	
DATE HIRED						<u>8/86</u>		AGE		<u>25</u>	
WAGES						<u>6.35</u>		O/T WAGE		<u>9.53</u>	
TERMINATION DATE								POSITION		<u>Typist</u>	
								REASON FOR LEAVING			
First Quarter											
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT
1											
2											
3											
4											
5											
6											

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

Employee's Earnings Record

NAME Carlos Garcia ADDRESS 3671 2nd St.
SINGLE MARRIED X Sulphur Springs, TX 75433
SOCIAL SECURITY NO. 465-87-4532 NO. OF EXEMPTIONS 3
DATE HIRED 9/4/89 AGE 35
WAGES 6.35 O/T WAGE 9.53 POSITION Lineman
TERMINATION DATE REASON FOR LEAVING

First Quarter

WEEK ENDING	TOTAL WAGES	SOC. SEC. TAX	FEDERAL WITH HOLDING TAX	HEALTH INS.	DIRECT SAVINGS	RETIREMENT
1						
2						
3						
4						
5						
6						

Employee's Earnings Record

NAME James Greenwood ADDRESS 1245 W. Randle Rd.
SINGLE X MARRIED Mt. Vernon, TX 75457
SOCIAL SECURITY NO. 345-74-9876 NO. OF EXEMPTIONS 1
DATE HIRED 3/29/88 AGE 22
WAGES 6.75 O/T WAGE 10.13 POSITION Lineman
TERMINATION DATE REASON FOR LEAVING

First Quarter

WEEK ENDING	TOTAL WAGES	SOC. SEC. TAX	FEDERAL WITH HOLDING TAX	HEALTH INS.	DIRECT SAVINGS	RETIREMENT
1						
2						
3						
4						
5						
6						

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

Employee's Earnings Record												
NAME <u>Regina Combs</u>				ADDRESS <u>1234 W. Cedar</u>								
SINGLE ☒ MARRIED ☐				MT. <u>Vernon</u> , TX <u>75457</u>								
SOCIAL SECURITY NO. <u>568-42-6521</u>				NO. OF EXEMPTIONS <u>1</u>								
DATE HIRED <u>2/21/88</u>				AGE <u>20</u>								
WAGES <u>6.50</u> O/T WAGE <u>9.25</u>				POSITION <u>Receptionist</u>								
TERMINATION DATE _____				REASON FOR LEAVING _____								
First Quarter												
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1												
2												
3												
4												
5												
6												

Employee's Earnings Record												
NAME <u>Mary Towers</u>				ADDRESS <u>2252 Concord</u>								
SINGLE ☒ MARRIED ☐				Mt. <u>Vernon</u> , TX <u>75457</u>								
SOCIAL SECURITY NO. <u>468-21-8977</u>				NO. OF EXEMPTIONS <u>1</u>								
DATE HIRED <u>3/9/88</u>				AGE <u>22</u>								
WAGES <u>8.25</u> O/T WAGE <u>12.63</u>				POSITION <u>Computer Technician</u>								
TERMINATION DATE _____				REASON FOR LEAVING _____								
First Quarter												
WEEK ENDING	TOTAL WAGES		SOC. SEC. TAX		FEDERAL WITH HOLDING TAX		HEALTH INS.		DIRECT SAVINGS		RETIREMENT	
1												
2												
3												
4												
5												
6												

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

INCOME TAX WITHHOLDING TABLE

EXEMPTIONS →	0		1		2		3		4	
WEEKLY WAGES (At least – But less than)	Federal		Federal		Federal		Federal		Federal	
	M	S	M	S	M	S	M	S	M	S
\$180–190	22.60	28.90	19.10	24.90	15.60	20.90	12.20	16.90	9.30	13.50
190–200	24.40	31.00	20.90	27.00	17.40	23.00	14.00	18.90	10.80	15.30
200–210	26.20	33.60	22.70	29.10	19.20	25.10	15.80	21.00	12.30	17.10
210–220	28.10	36.20	24.50	31.20	21.00	27.20	17.60	23.10	14.10	19.10
220–230	30.20	38.80	26.30	33.80	22.80	29.30	19.40	25.20	15.90	21.20
230–240	32.30	41.40	28.30	36.40	24.60	31.40	21.20	27.30	17.70	23.30
240–250	34.40	44.00	30.40	39.00	26.40	34.00	23.00	29.40	19.50	25.40
250–260	36.50	46.60	32.50	41.60	28.50	36.60	24.80	31.60	21.30	27.50
260–270	38.60	49.20	34.60	44.20	30.60	39.20	26.60	34.20	23.10	29.60
310–320	49.90	63.80	45.30	58.10	41.10	52.30	37.00	47.20	33.00	42.20
320–330	52.30	66.80	47.70	61.10	43.20	55.30	39.10	49.80	35.10	44.80
330–340	54.70	70.00	50.10	64.10	45.50	58.30	41.20	52.50	37.20	47.40
340–350	57.10	73.40	52.50	67.10	47.90	61.30	43.30	55.50	39.30	50.00
350–360	59.50	76.80	54.90	70.30	50.30	64.30	45.70	58.50	41.40	52.80
360–370	61.90	80.20	57.30	73.70	52.70	67.30	48.10	61.50	43.50	55.80
370–380	64.60	83.60	59.70	77.10	55.10	70.50	50.50	64.50	45.90	58.80
380–390	67.40	87.00	62.10	80.50	57.50	73.90	52.90	67.50	48.30	61.80
390–400	70.20	90.40	64.80	83.90	59.90	77.30	55.30	70.80	50.70	64.80
400–410	73.00	93.80	67.60	87.30	62.30	80.70	57.70	74.20	53.10	67.80
460–470	90.20	115.80	84.40	108.30	79.00	101.10	73.60	94.60	68.20	88.10
470–480	93.40	119.70	87.30	112.20	81.80	104.70	76.40	98.00	71.00	91.50
480–490	96.60	123.60	90.50	116.10	84.60	108.60	79.20	101.40	73.80	94.90

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

NAME _____										
	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
	EARNINGS			DEDUCTIONS						

Detach and Retain this Statement

TO THE
ORDER OF _____ DATE _____ \$ _____

PAY _____ DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
 1000 Main St.
 Ft. Worth, TX 75422

 AUTHORIZED SIGNATURE

NAME _____										
	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
	EARNINGS			DEDUCTIONS						

Detach and Retain this Statement

TO THE
ORDER OF _____ DATE _____ \$ _____

PAY _____ DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
 1000 Main St.
 Ft. Worth, TX 75422

 AUTHORIZED SIGNATURE

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

NAME _____										
	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
	EARNINGS			DEDUCTIONS						

Detach and Retain this Statement

TO THE ORDER OF _____ DATE _____ \$ _____

PAY _____ DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
 1000 Main St.
 Ft. Worth, TX 75422

 AUTHORIZED SIGNATURE

NAME _____										
	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
	EARNINGS			DEDUCTIONS						

Detach and Retain this Statement

TO THE ORDER OF _____ DATE _____ \$ _____

PAY _____ DOLLARS

FOR USE IN BUSINESS SIMULATION SET

LYKE Radio Station
 1000 Main St.
 Ft. Worth, TX 75422

 AUTHORIZED SIGNATURE

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
			EARNINGS			DEDUCTIONS				
Detach and Retain this Statement TO THE ORDER OF _____ DATE _____ \$ _____ PAY _____ DOLLARS FOR USE IN BUSINESS SIMULATION SET LYKE Radio Station 1000 Main St. Ft. Worth, TX 75422 _____ AUTHORIZED SIGNATURE										

NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
			EARNINGS			DEDUCTIONS				
Detach and Retain this Statement TO THE ORDER OF _____ DATE _____ \$ _____ PAY _____ DOLLARS FOR USE IN BUSINESS SIMULATION SET LYKE Radio Station 1000 Main St. Ft. Worth, TX 75422 _____ AUTHORIZED SIGNATURE										

OSS/Simulations/Section VII
Financial Management Activities
Three-Hour Simulation

NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
			EARNINGS			DEDUCTIONS				
Detach and Retain this Statement TO THE ORDER OF _____ DATE _____ \$ _____ PAY _____ DOLLARS FOR USE IN BUSINESS SIMULATION SET LYKE Radio Station 1000 Main St. Ft. Worth, TX 75422 _____ AUTHORIZED SIGNATURE										

NAME	PERIOD ENDING	HOURS WORKED	REGULAR	OVERTIME	TOTAL	FEDERAL INC TAX	FICA	DISTRICT INC TAX	TOTAL	NET PAY
			EARNINGS			DEDUCTIONS				
Detach and Retain this Statement TO THE ORDER OF _____ DATE _____ \$ _____ PAY _____ DOLLARS FOR USE IN BUSINESS SIMULATION SET LYKE Radio Station 1000 Main St. Ft. Worth, TX 75422 _____ AUTHORIZED SIGNATURE										

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OFFICE SUPPORT SYSTEMS

SECTION VIII

COMMUNICATIONS

SIMULATIONS

INSTRUCTIONS

This is a simulation prepared for Section VIII, Units 1, 2 and 3 of the *Office Support Systems Curriculum Guide*. The simulation should be completed after the study of the reference materials in **Section VIII: Communications**. Students should have studied and completed all written work for **Unit I--Communications Skills**, **Unit II--Writing Skills**, and **Unit III--Telephone Skills**. The competency tests following these units should determine whether or not the students are ready for the hands-on simulation.

The simulation is divided into two sections. The one-hour simulation should be completed for a one-semester course. The three-hour simulation should be completed for a one-year course.

This simulation can be performed on any microcomputer system. Your students will need access to a microcomputer, a blank disk for data storage, and a word processing software package of your choice. It is assumed that you have spent whatever time is needed to acquaint the students with both the computer and word processing software which they will use.

This simulation contains the following:

One-Hour Simulation

- Correct the letter to Sherry Charles
- Complete the phone message form
- Write the press release

Three-Hour Simulation

- Correct the letter to Sherry Charles
- Complete the phone message forms
- Write the press release
- Complete the long-distance log
- Write a request letter
- Write a goodwill letter

SPECIFIC TEACHING SUGGESTIONS

One-Hour Simulation

The letter to Sherry Charles is to be written as a business letter. If the students have trouble with the terminology used in the letter, you may have to tell them what they mean. For example, a "little shoot" is a small photo session. Many versions of this letter may evolve.

The press release will vary with whom the students have chosen to include in the release.

Three-Hour Simulation

The request letter and the goodwill letter will be composed by the students from the information given. You should watch for grammar, spelling, punctuation, and style. Make sure the students include the information given for each letter.

ANSWERS

Letter to Sherry Charles

Evaluated to the satisfaction of the instructor.

Press Release

The content of the news release may vary. The following is a sample of information that should be included in the news release. Make sure the proper format is used.

Ms. Tiffany George, vice-president of Public Relations at Smiles, will be having a party at her house next Saturday evening, (insert appropriate date).

Some of the invited guests that have been confirmed are: Tom Cruise, Emma Samms, Cybil Shepherd, Bruce Willis, Kim Basinger, Don Johnson, and many others to her party extravaganza.

The entertainment will be provided by Bon Jovi, New Kids on the Block, and George Strait.

The party will be catered by La Mansion of Dallas.

###

OSS/Simulations/Section VIII
Communications Answers

Message

For Tiffany

From Michael Johnson

Date (current) Time 10:30 a.m.

Phone No. (213) 555-7432

Telephoned	☒	Please call	☒
Called to see you	☐	Will call again	☐

Message: He wants to know whether to wear casual clothes or formal clothes to the party on Saturday.

Call taken by (Student)

Message

For Tiffany

From Cheryl Yieg

Date (current) Time 11:15 a.m.

Phone No. (214) 659-1234

Telephoned	☒	Please call	☒
Called to see you	☐	Will call again	☐

Message: She will be at the alone number until 5:00. She wants to know when and where her next fitting will be.

Call taken by (Student)

Message

For Tiffany

From Carol Alt

Date (current) Time 11:20 a.m.

Phone No. (213) 962-2233

Telephoned	☒	Please call	☒
Called to see you	☐	Will call again	☐

Message: She having trouble with the photo session. She is very upset.

Call taken by (Student)

Message

For Tiffany

From Christy Bunkley

Date (current) Time 11:25 a.m.

Phone No. (619) 335-7799

Telephoned	☒	Please call	☒
Called to see you	☐	Will call again	☐

Message: She needs to discuss a personal matter. She asks that the call be returned as soon as possible.

Call taken by (Student)

OSS/Simulations/Section VIII Communications Answers

TELEPHONE LOG

[illegible]

The following letters are suggested guidelines. The answers may vary.

Letter to Christi Coffee

(Today's date)

Ms. Christi Coffee
702 High Hills Dr.
Highland Park, TX 75528

Dear Ms. Coffee:

Thank you for the wonderful job you did on Smiles, Inc.'s brochure. Your idea seems to be working very well. I recently saw your new fashion layout in *Vogue*. The layout was very impressive.

I would like you to come to my office next Wednesday morning at 10:30 to discuss possible working arrangements between you and Smiles, Inc. Your work is what is needed at Smiles.

If next Wednesday is a bad day, please contact me at (214) 881-5723 so we can schedule a convenient time for both of us. I look forward to meeting with you again.

Sincerely,

Tiffany George
Vice President of Public Relations

urs

OSS/Simulations/Section VIII
Communications Answers

Letter to Linda Cintron

(Today's date)

Ms. Linda Cintron
506 Satterback Road
Plano, TX 75622

Dear Ms. Cintron:

Welcome to Smiles, Inc. I wish to congratulate you on being selected for the Information Specialist position. You will begin your new job next Monday morning at 9:00. When you arrive, please come to my office. I will take you on a tour of our office and I will introduce you to our staff.

On Saturday, (insert date), I am having an employee party at my home. Several of Smiles' top models will be attending as well as a large number of well-known celebrities. This will be an opportunity for you to meet some of the people that we work with at Smiles.

Please call me at my personal number: (214) 881-5723 if you are able to attend the party, or if you have any questions.

Sincerely,

Tiffany George

urs

OSS/Simulations/Section VIII
Evaluation Sheet

Name: _____

Grade: _____

Section: _____

Date: _____

COMMUNICATION SIMULATION EVALUATION SHEET

Received	Description
One-Hour Simulation	
_____	Corrected letter
_____	Phone messages
_____	Press release
_____	Long-distance log
Comments:	
Three-Hour Simulation	
_____	Corrected letter
_____	Phone messages
_____	Press release
_____	Long-distance log
_____	Request letter
_____	Goodwill letter
Comments:	

Received	Description
Grades	
One-Hour Simulation	
Corrected letter	_____
Phone messages	_____
Press release	_____
Long-distance log	_____
Grade Average:	_____
Grades	
Three-Hour Simulation	
Correct letter	_____
Phone messages	_____
Press release	_____
Long-distance log	_____
Request letter	_____
Goodwill letter	_____
Grade Average:	_____

SMILES, INC MODELING AGENCY

You have been hired by Smiles, Inc. as the personal executive secretary to Tiffany George. Tiffany is the vice president of public relations for Smiles, Inc. You have been given a position with a lot of responsibility which requires considerable knowledge with the use of the English language.

Upon your arrival at the office, you discover that Tiffany has left your work with the receptionist. When you get to your office, you begin reading through the work. Tiffany has made several mistakes in her first letter. She requests that you key in the letter using full-block style format and that you "fix" her mistakes.

(Today's date)

Sherry Charles
900 Hollywood Blvd.
Hollywood, CA 90026

Sherry! I can't believe that you could do this to me! I don't want you to do just some "little shoot." I just want you to do this photo session so that I can show your picture around Dallas. I want to in Houston, too. We need the pics as soon as possible and if you want to work in Texas and if you want also to expand your horizons, I need you to do this job this week. I need those pictures now! You had better hurry up and make an decision. Be here at the end of next week. The Smiles in Los Angeles is just one branch of many around the U.S. and everyone reports to me. Another thing. We are having a party this weekend and I want us to enjoy and relax. I almost forget to tell you. Your wardrobe expense account has been approved and we'll go shopping on Saturday before the party. I think we'll go to Neiman Marcus. Don't forget to answer here soon because I need to reschedule the photo session.

Later:

Tif

After working through Tiffany's first letter, you decide to start the next project, but the telephone rings. Since Tiffany is not in, you record the following message on a telephone message form.

Michael Johnson would like Tiffany to call him at his brother's home. The number is (213)555-7432. He wants to know if she wants him to wear casual clothes or formal clothes on Saturday for the party. He called at 10:30 a.m.

After completing the message, you pick up your next item of work. Tiffany wants you to write up a draft of a press release using the proper format, using the following information about her party next Saturday night:

1. Select at least six of the celebrities from the partial confirmed guest list Tiffany has given you.
2. Describe the groups who will be providing entertainment for the party.
3. The catering will be done by La Mansion of Dallas.
4. Proofread and correct any mistakes in the press release before giving it to her.
5. Give the draft of the press release to her for approval.

GUEST LIST	
Cheryl Tiegs	Don Johnson
Carol Alt	Tom Selleck
Christy Brinkley	Tom Cruise
Rob Lowe	Paula Abdul
Kim Basinger	Patrick Duffy
Bruce Willis	Elizabeth Taylor
Larry Hagman	Victoria Principal
Cybil Shepherd	Emma Samms
Michael Jackson	Patick Swazyee

ENTERTAINMENT

Bon Jovi
New Kids on the Block
George Strait

(Stop here for the one hour simulation.)

OSS/Simulations/Section VIII
Communications Activities

Just as you finish the news release, Tiffany comes into the office. You greet her and give her the work you completed along with her phone message. She tells you to take a break and she will have your news release ready when you return.

When you enter your office, after your break, the phone is ringing. Upon answering the phone, you discover that the receptionist has taken three phone messages, and all of them need return calls as soon as possible. When you pick up the messages, they are just written on a piece of paper. You must transfer the messages to message forms. The messages are as follows:

Cheryl Tiegs called at 11:15 and she wants to know when her next fitting is and where it is going to be. She will only be at this number until 5:00. The number is (214)659-1234.

Carol Alt called at 11:20 and she is having trouble with the photography session. She is very upset, says she does not like him, and that she does not want to work with "him" any longer. Her number is (213)962-2233.

Christy Brinkley called at 11:25. She would like to talk to Tiffany as soon as she can return the call. Christy said that there was a "personal" matter that she needs to discuss with Tiffany. She will be at (619)335-7799.

After transferring the numbers to the message forms, Tiffany walks in. You give her the messages and the press release. After reading her messages, she requests you to enter the four calls into her long-distance log while she is placing the return phone calls.

After making the calls Tiffany stops by your desk and tells you how pleased she is with your work.

After lunch Tiffany is waiting for you. She wants you to write two letters using the information below. Prepare the letters in full-blocked style.

The letter will be to Christi Coffee who is currently the advertising agent for one of Smiles, Inc. competitors. Tiffany wants to meet with Ms. Coffee to convince her to "come over to our side." The meeting will be next Wednesday morning at 10:30. Ms. Coffee recently did a brochure for Smiles. She also designed a fashion layout in *Vogue* that really impressed Tiffany. Ms. Coffee can reply using Tiffany's private number: (214) 881-5723. Ms. Coffee's address is 702 High Hills Dr., Highland Park, TX 75528.

This letter will be to Linda Cintron who has recently been hired for the position of information specialist at Smiles, Inc. Tiffany would like you to send Linda a letter congratulating and welcoming her to Smiles. She will begin her new job on Monday morning at 9:00. She will need to come to Tiffany's office so Tiffany can show her around the office and introduce her to the staff. Tiffany also wishes to invite Ms. Cintron to the party on Saturday night. She would like Ms. Cintron to reply by calling her personal number: (214)881-5723. Ms. Cintron's address is 506 Satterback Rd., Plano, TX 75622.

When you have completed the letters, be sure to proofread for errors, and if you find any, make corrections and then reprint the letters. Be sure that the letters are ready for Tiffany's signature.

You have done well for your first day at Smiles, Inc.

OSS/Simulations/Section VIII
Communications Activities

Message

For _____

From _____

Date _____ Time _____

Phone No. _____

Telephoned		Please call	
Called to see you		Will call again	

Message: _____

Call taken by _____

Message

For _____

From _____

Date _____ Time _____

Phone No. _____

Telephoned		Please call	
Called to see you		Will call again	

Message: _____

Call taken by _____

Message

For _____

From _____

Date _____ Time _____

Phone No. _____

Telephoned		Please call	
Called to see you		Will call again	

Message: _____

Call taken by _____

Message

For _____

From _____

Date _____ Time _____

Phone No. _____

Telephoned		Please call	
Called to see you		Will call again	

Message: _____

Call taken by _____

OSS/Simulations/Section VIII Communications Activities

[illegible]

COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

- (1) acceptance policies on student transfers from other school districts;
- (2) operation of school bus routes or runs on a non-segregated basis;
- (3) nondiscrimination in extracurricular activities and the use of school facilities;
- (4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;
- (5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;
- (6) nondiscriminatory practices relating to the use of a student's first language; and
- (7) evidence of published procedures for hearing complaints and grievances.

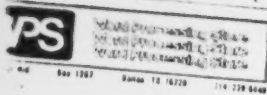
In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964; EXECUTIVE ORDERS 11246 AND 11375; TITLE IX, 1973 EDUCATION AMENDMENTS; REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; AND VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulations by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs or activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.



OFFICE USE ONLY

Publication	Number
Publication	Number

APPLICATION FOR EMPLOYMENT

PLEASE PRINT NAME

The company representative will interview you at our representative office and will not be responsible for your transportation. A copy of your background and work history will be sent to the company for their review. Your application will only be processed if you are a resident of the United States.

PERSONAL

NAME _____ SEX _____ DATE OF BIRTH _____
ADDRESS _____ CITY _____ STATE _____ ZIP _____
TELEPHONE _____
EDUCATION _____
EMPLOYMENT HISTORY _____
REFERENCES _____

RECORD OF EDUCATION

School	Grade and Address of School	Course of Study	Class Year	Did You Graduate?
James Brown	174	174	174	174
James Brown	174	174	174	174
James Brown	174	174	174	174

OFFICE SUPPORT SYSTEMS

PLAYMOR GYM EQUIPMENT

Message

For _____
From _____
Date _____
Phone No. _____
Telephoned _____
Called to see you _____
Message _____

NAME _____
ADDRESS _____
CITY _____
STATE _____
ZIP _____

DATE	EXPLANATION	DEBIT	CREDIT	BALANCE
1/1/74	1/1/74	1/1/74	1/1/74	1/1/74
1/1/74	1/1/74	1/1/74	1/1/74	1/1/74

Test Bank

Educational Development and Training Center
East Texas State University • Commerce, TX 75428

BEST COPY AVAILABLE

OFFICE SUPPORT SYSTEMS TEST BANK

Prepared by

**Jan Patton
Office Education Curriculum Specialist**

Published by

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in cooperation with

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Educational Development & Training Center
East Texas State University • Commerce, TX 75428

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PREFACE

The test banks for the *Office Support Systems Curriculum Guide* were prepared to provide quality instructional materials for instructors of office support system courses in Texas.

These test banks have been developed through a joint effort of the Texas Education Agency and the Educational Development and Training Center located on the campus of East Texas State University at Commerce, Texas.

The purpose of developing these test banks is to provide microcomputer application instructors with test banks coordinated with the *Office Support Systems Curriculum Guide* that assists them with course management and flexibility. Suggestions and comments concerning these test banks are requested to be sent to the curriculum specialist at the Educational Development and Training Center.

USE AND ORGANIZATION OF THE TEST BANK

The true and false questions and the multiple choice questions are on the data disks for the *Office Support Systems Test Bank*. There is also a hard copy of these tests enclosed in the *Test Bank* book. (See listing of file names on next page.)

Also included in the *Test Bank* book are matching, fill in the blank and essay questions; and brief problems and exercises which can be used at your own discretion. They are not on the *Test Bank* data disks.

OFFICE SUPPORT SYSTEMS TEST BANK FILE NAMES

SECTION/UNIT	TITLES	DATA DISK	FILE NAME
I.	INTRODUCTION TO OFFICE SUPPORT SYSTEMS		
	NO TEST BANK		
II.	KEYBOARDING	1	
	1 Information Processing Concepts		OSSS2U1
	2 Proofreading & Correcting Errors		OSSS2U2
	3 Keyboarding Applications		OSSS2U3
III.	EMPLOYMENT		
	NO TEST BANK		
IV.	FILING	2	
	1 Alphabetic Filing		OSSS4U1
	2 Numeric Filing		OSSS4U2
	3 Other Filing Systems		OSSS4U3
V.	PROCESSING MAIL	3	
	1 Incoming and Outgoing Mail		OSSS5U1
	2 Electronic Mail		OSSS5U2
VI.	BUSINESS OPERATIONS		
	NO TEST BANK		
VII.	FINANCIAL MANAGEMENT	4	
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	2 Payroll and Tax Account		OSSS7U2
VIII.	COMMUNICATIONS	5	
	1 Communication Skills		OSSS8U1
	2 Writing Skills		OSSS8U2
	3 Telephone Skills		OSSS8U3

TRUE AND FALSE

1. The electronic typewriter is a type of word processing equipment.
2. The calculator is a type of word processing equipment.
3. The microcomputer is the only type of word processing equipment.
4. The keyboards of the electronic typewriter, the electric typewriter, and the microcomputer are similar.
5. The keyboarding position of the electric typewriter is similar to the electronic typewriter.
6. Information is increasing at a high rate.
7. Information is a collection of characters, symbols, and numbers.
8. Output, printing, and reproduction are steps in the disk maintenance cycle.
9. Alphabetic, numeric, and punctuation keys are different on all keyboards.
10. The electric, electronic, and microcomputer equipment all have a monitor.
11. One blank line is left between lines in double spacing.
12. Centering horizontally on the microcomputer is a manual operation.
13. Placement of text slightly above vertical center is called reading position.
14. The common special features of an electric typewriter may include a correction key.
15. The function keys vary according to make and model of equipment.
16. Special keys not generally found on a typewriter are the punctuation keys.
17. The home key moves the cursor one space in any of four directions.
18. The caps lock key allows the operator to type in all capital letters.
19. The backspace key can be used to erase screen characters that are highlighted by the cursor.
20. The function keys vary from computer to computer.
21. The number lock enables the number keypad to be used for entering numbers.
22. The success of most businesses depends on the efficient and timely management of programs.
23. Information is expected to double every three years.

24. Tab right/left keys move the cursor to a set tab or a default position.
25. Pitch refers to the number of spaces available per horizontal inch.

MULTIPLE CHOICE

1. Information expresses an idea and is:
A. The orderly arrangement of facts C. Increasing at a high rate
B. The basis for decision making D. All of the above
2. Information is a collection of:
A. Characters, symbols, and numbers C. Symbols, numbers, and machines
B. Characters, symbols, and software D. None of the above
3. Which of the following is a step in the information processing cycle?
A. Input or originator C. File, storage, and retrieval
B. Processing D. All of the above
4. New technology facilitates:
A. Faster information processing C. Both A and B
B. Cheaper information processing D. None of the above
5. Which of the following is a common type of word processing equipment?
A. Electric typewriters C. Microcomputers
B. Electronic typewriters D. All of the above
6. Output, printing, and reproduction are steps in the:
A. Disk maintenance cycle C. Information processing cycle
B. Data entry cycle D. Both A and B
7. Correct keyboarding position includes:
A. Eyes on the monitor C. Wrists high
B. Feet flat on the floor D. Forearms at right angles to keyboard
8. Alphabetic, numeric, and punctuation keys are:
A. Standard for all keyboards C. Different for electric typewriters and microcomputers
B. Different for all keyboards D. None of the above
9. Electric, electronic, and microcomputer equipment all have a:
A. Monitor C. Disk drive
B. Power switch D. Central processing unit

10. Safe operation of information processing equipment includes NEVER inserting:
A. Paper clips into machine
B. Information into machine
C. Paper into machine
D. Both A and C
11. Basic typewriting supplies include:
A. Paper
B. Correction tape
C. Typewriter ribbon
D. All of the above
12. One blank space is left between lines in:
A. Triple spacing
B. Single spacing
C. Double spacing
D. None of the above
13. The number of spaces in an elite inch is:
A. 15 spaces
B. 10 spaces
C. 12 spaces
D. All of the above
14. The number of spaces available for typing per horizontal inch is called:
A. Proportional
B. Pitch
C. Scope
D. Spacing
15. Margins for a 60-space line elite type are:
A. 16-91
B. 26-81
C. 21-86
D. 21-81
16. Centering horizontally on the microcomputer is a(n):
A. Automatic key operation
B. Manual operation
C. Both A and B
D. Neither A nor B
17. Placement of text slightly above vertical center is called:
A. Uncentered material
B. Elevated material
C. Reading position
D. Typing position
18. Punctuation keys are activated by holding down:
A. Shift key only and specific character
B. Either shift key and/or specific character
C. Control key and specific character
D. Alternate key and specific character
19. Alphanumeric keys include:
A. Alphabetic keys
B. Top row numbers/symbol keys
C. Punctuation keys
D. All of the above

20. Special features on the electric typewriter are:
- | | |
|------------------------|--------------------------|
| A. In varied locations | C. In standard locations |
| B. In some locations | D. None of the above |
21. The common special features of an electric typewriter may include the:
- | | |
|-------------------|---------------------|
| A. Correction key | C. Pitch selector |
| B. Element | D. All of the above |
22. Which of these features of the electric typewriter differ according to make and model of the equipment?
- | | |
|--------------------|---------------------------|
| A. Number keys | C. Function keys |
| B. Alphabetic keys | D. Special character keys |
23. Special features of the electronic typewriter include:
- | | |
|--------------------|---------------------|
| A. Memory backup | C. Delete function |
| B. Insert function | D. All of the above |
24. Materials needed to "get started" on the microcomputer include:
- | | |
|-------------------------|---------------------|
| A. Appropriate diskette | C. Paper and pencil |
| B. Paper stand | D. All of the above |
25. Information you input into the computer will:
- | | |
|------------------------------------|---------------------------------------|
| A. Be displayed on the monitor | C. Be printed simultaneously as typed |
| B. Not be displayed on the monitor | D. All of the above |
26. Vertical centering is easier if you have a:
- | | |
|---------------------------|------------------------|
| A. Print-out | C. Full screen display |
| B. Partial screen display | D. None of the above |
27. Manual centering is required on most:
- | | |
|---------------------------|------------------------------|
| A. Microcomputers | C. Electric typewriters |
| B. Electronic typewriters | D. Dedicated word processors |
28. Special keys not generally found on an electric typewriter are:
- | | |
|-------------------------|-----------------------|
| A. Alphabetic keys | C. Number/symbol keys |
| B. Cursor movement keys | D. Punctuation keys |
29. Which keys move the cursor one space?
- | | |
|---------------|-------------------|
| A. Arrow keys | C. Page down keys |
| B. Home keys | D. End keys |

30. A key that is usually program-specified to leave certain programs or menu structures is the:
- | | |
|------------------|---------------|
| A. Delete key | C. End key |
| B. Page down key | D. Escape key |
31. A key which enables the operator to type in all caps is the:
- | | |
|------------------|----------------------|
| A. Backspace key | C. Caps lock key |
| B. Shift key | D. None of the above |
32. Which key can be used to erase screen characters that are highlighted by the cursor?
- | | |
|------------------|-----------------|
| A. Backspace key | C. Escape key |
| B. Delete key | D. Both A and B |
33. The type of keys that vary from computer to computer are:
- | | |
|---------------|------------|
| A. Function | C. Numeric |
| B. Alphabetic | D. Symbol |
34. The number lock enables the number keypad to be used for:
- | | |
|-------------------------|----------------------|
| A. Directional movement | C. Deleting data |
| B. Entering numbers | D. None of the above |
35. Which of the following is located either to the left of the alphabetic keys or above the number keys?
- | | |
|------------------|---------------|
| A. Print SCR | C. Delete key |
| B. Function keys | D. Shift key |
36. The display screen is called all of the following EXCEPT:
- | | |
|------------|----------------------------|
| A. Monitor | C. Video display terminal |
| B. Screen | D. Central processing unit |
37. The equipment used to print out text that is entered into the microcomputer is called a:
- | | |
|-------------------------|-----------------|
| A. Monitor | C. Printer |
| B. Video display screen | D. Both B and C |
38. When using pica, margins for a 50 space line would be:
- | | |
|----------|----------|
| A. 26-76 | C. 26-81 |
| B. 17-67 | D. 17-72 |

39. Information expresses an idea and is a collection of all of the following EXCEPT:
- | | |
|---------------|-------------|
| A. Characters | C. Pictures |
| B. Numbers | D. Symbols |
40. The success of most businesses depends on the efficient and timely management of:
- | | |
|-------------|----------------|
| A. Programs | C. Data |
| B. Facts | D. Information |
41. Information is estimated to double every:
- | | |
|----------------|--------------|
| A. Three years | C. Ten years |
| B. Six years | D. Two years |
42. Characteristics of information include:
- | | |
|-------------|---------------------|
| A. Accurate | C. Concise |
| B. Timely | D. All of the above |
43. Major elements involved in information processing include all of the following EXCEPT:
- | | |
|---------------|--------------|
| A. People | C. Printing |
| B. Procedures | D. Equipment |
44. Information processing can be done on which of the following equipment?
- | | |
|---------------------------|---------------------|
| A. Electric typewriters | C. Microcomputers |
| B. Electronic typewriters | D. All of the above |
45. The information processing cycle includes all of the following EXCEPT:
- | | |
|---------------|----------------------------------|
| A. Procedures | C. File, storage, and retrieval |
| B. Processing | D. Distribution or communication |
46. Information processing can be done on all of the following EXCEPT:
- | | |
|-------------------------|---------------------------|
| A. Electric typewriters | C. Electronic typewriters |
| B. Electric calculators | D. Microcomputers |
47. Appropriate keyboarding position includes all of the following EXCEPT:
- | | |
|---------------|-----------------|
| A. Sit erect | C. Eyes on copy |
| B. Cross legs | D. Wrists low |
48. Pitch refers to the number of spaces available for typing:
- | | |
|------------------------|----------------------|
| A. Per horizontal inch | C. Per vertical page |
| B. Per vertical inch | D. Both A and C |

MATCHING

INSTRUCTIONS: Match the appropriate letter in the blank provided.

- A. Information
- B. Keyboarding material
- C. Keyboarding position
- D. Standard keys
- E. Operating controls
- F. Keyboarding
- G. Line-space selector
- H. Pica type
- I. Elite type
- J. Line scale
- K. Reading position
- L. Correction key

- M. Function key
- N. Memory backup
- O. Delete function
- P. Print wheel
- Q. Cursor movement
- R. Home keys
- S. Page down
- T. Page up
- U. End key
- V. Cursor
- W. Caps lock key
- X. Print screen

- _____ 1. Erases
- _____ 2. Prints screen
- _____ 3. Up/screen
- _____ 4. Special purpose keys
- _____ 5. 12 spaces per horizontal inch materials
- _____ 6. Expresses an idea
- _____ 7. Directional keys
- _____ 8. Shaped like a daisy
- _____ 9. Feet flat on floor
- _____ 10. Shows horizontal space available
- _____ 11. Moves document down one full screen
- _____ 12. Types in all caps

- _____ 13. Typewriter ribbon
- _____ 14. Removes text
- _____ 15. Moves cursor to end of line
- _____ 16. Vertical spacing
- _____ 17. Storage capability
- _____ 18. Moves cursor to upper left on screen
- _____ 19. 10 spaces per horizontal inch
- _____ 20. Indicates position text will be entered
- _____ 21. Alphabetic keys
- _____ 22. Vertical centering
- _____ 23. Eyes on copy

FILL IN THE BLANK

INSTRUCTIONS: Place the appropriate word or words in the blank provided.

- _____ 1. The electronic typewriter is a type of _____ equipment.
- _____ 2. The keyboards of the _____, _____, and _____ are similar.
- _____ 3. Information is increasing at a _____ rate.
- _____ 4. _____ is a collection of characters, symbols, and numbers.
- _____ 5. Output, printing, and reproduction are steps in the _____ cycle.
- _____ 6. _____, _____, and _____ keys are the same on all keyboards.
- _____ 7. One blank line is left between lines in _____ spacing.
- _____ 8. Placement of text slightly above vertical center is called _____.
- _____ 9. The _____ keys vary according to make and model of equipment.
- _____ 10. Special keys normally found on a typewriter are the _____ keys.
- _____ 11. The _____ keys move the cursor one space in any of four directions.
- _____ 12. The _____ key allows the operator to type in all caps.
- _____ 13. The _____ key can be used to erase screen characters that are highlighted by the cursor.
- _____ 14. The _____ keys vary from computer to computer.
- _____ 15. The _____ enables the number keypad to be used for entering numbers.
- _____ 16. The success of most businesses depends on the efficient and timely management of _____.
- _____ 17. Information is expected to double every _____ years.

- _____ 18. _____ keys move the cursor to a set tab or a default position.
- _____ 19. _____ refers to the number of spaces available per horizontal inch.
- _____ 20. _____ consist of instructions that tell the computer what to do.

ESSAY

2. Discuss the three elements involved in information processing and list the five steps involved.

- 14

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. T | 9. F | 17. F |
| 2. F | 10. F | 18. T |
| 3. F | 11. T | 19. F |
| 4. T | 12. F | 20. T |
| 5. T | 13. T | 21. T |
| 6. T | 14. T | 22. F |
| 7. T | 15. T | 23. F |
| 8. F | 16. F | 24. T |
| | | 25. T |

Multiple Choice

- | | | | |
|-------|-------|-------|-------|
| 1. D | 13. C | 25. A | 37. C |
| 2. A | 14. B | 26. C | 38. D |
| 3. D | 15. C | 27. C | 39. C |
| 4. C | 16. A | 28. B | 40. D |
| 5. D | 17. C | 29. A | 41. B |
| 6. C | 18. B | 30. D | 42. D |
| 7. B | 19. D | 31. C | 43. C |
| 8. A | 20. A | 32. B | 44. D |
| 9. B | 21. D | 33. A | 45. A |
| 10. A | 22. C | 34. B | 46. B |
| 11. D | 23. D | 35. B | 47. B |
| 12. C | 24. D | 36. D | 48. A |

Matching

- | | | |
|------|-------|-------|
| 1. L | 8. P | 16. G |
| 2. F | 9. C | 17. N |
| 3. T | 10. J | 18. R |
| 4. M | 11. S | 19. H |
| 5. I | 12. W | 20. V |
| 6. A | 13. F | 21. D |
| 7. Q | 14. O | 22. K |
| | 15. U | 23. C |

Fill in the Blank

- | | |
|--|-----------------------|
| 1. Word processing | 11. Arrow |
| 2. Electric, electronic, and microcomputer | 12. Caps lock |
| 3. High or fast | 13. Delete |
| 4. Information | 14. Function |
| 5. Information processing | 15. Number lock |
| 6. Alphabetic, numeric, and punctuation | 16. Information |
| 7. Double | 17. Double |
| 8. Reading position | 18. Tab |
| 9. Function | 19. Pitch |
| 10. Punctuation | 20. Software programs |

Essay

1. Information processing is a collection of characters, symbols, and numbers that express an idea.

Characteristics--

1. Information is the orderly arrangement of facts.
 2. Information should be accurate, timely, concise, and complete.
 3. Information is used as a basis for making decisions.
 4. The success of most businesses depends on the efficient and timely management of information.
 5. Information is increasing at a high rate. It is estimated that information doubles every six years.
2. People, procedures, and equipment are the three major elements involved in information processing.

Steps--

1. Input or origination
 2. Processing
 3. Output, printing, or reproduction
 4. File, storage, and retrieval
 5. Distribution or communication
3. Keyboarding position, basic supplies, and alphanumeric keyboards are standard for all three types of equipment. The electronic typewriter and the microcomputer have special features such as function keys, memory backup, insert/delete function, print wheel, and printer. The microcomputer contains additional special keys such as the cursor movement keys, arrow keys, home key, backspace key, etc. The display screen, often called the VDT (video display terminal), shows a display of text entered into the microcomputer. Software programs consisting of instructions telling the computer what to do are necessary for operation of the microcomputer.
 4. Evaluated to the satisfaction of the instructor.

TRUE AND FALSE

1. Understanding proofreader marks is not an important skill for a good editor.
2. Proofreading takes place only before preparation of the final copy.
3. Copy should be proofread three times.
4. Material should be proofread after it is "cold."
5. Doubling of small words or of syllables within a word is not a common mistake.
6. Spelling errors often occur in names and places.
7. Use a reference book to check the spelling of ALL unfamiliar words and words of which you are unsure.
8. Grammatical errors might involve capitalization errors.
9. Incomplete sentences or run-on sentences are a type of spelling error.
10. Proofreading the correct format requires a knowledge of appropriate typed formats and variations for basic business documents.
11. Proofreading for correct format requires a knowledge of grammatical errors.
12. The spacing of material is a consideration in style.
13. Using a colon after the salutation and a comma after the closing is called mixed punctuation style.
14. The salutation is a special letter part.
15. The main heading on a report is never centered.
16. Only one subject should be addressed in a paragraph.
17. Noticeable corrections are acceptable.
18. Column headings are aligned at the right of the column.
19. Right margins should be very uneven.
20. An example of an author's writing error is a content error.
21. Proofread a final copy after taking it out of the typewriter.
22. Using a spell checker will not find all of the mistakes.
23. Spell checkers do not detect mistakes in tense and usage.

24. Grammar checkers are not available options for proofreaders.
25. A spell checker eliminates proofreading skills.

MULTIPLE CHOICE

1. A good editor possesses which of the following qualities?
A. Command of language
B. Attention to detail
C. Pride in accurate work
D. All of the above
2. How many times should a copy be proofread?
A. Two times
B. One time
C. Three times
D. Five times
3. Proofreading procedures include all of the following EXCEPT:
A. Checking grammatical structure
B. Checking spelling and errors
C. Reading from right to left
D. Rereading after errors are cold
4. Checking for transposed letters in words is a common procedure when:
A. Punctuating
B. Proofreading
C. Word dividing
D. All of the above
5. Common proofreading errors include which of the following?
A. Substitution of words
B. Transposition of numbers
C. Transposition of words
D. All of the above
6. Omission errors often involve:
A. Omission of a page
B. Omission of a paragraph
C. Omission of a line
D. None of the above
7. To insure correct spelling:
A. Check spelling of all unfamiliar words
B. Guess at the spelling
C. Ask a co-worker to spell the word
D. Use another word
8. Frequently confused words are:
A. "Affect" and "effect"
B. "Ensure", "insure", and "assure"
C. Both A and B
D. None of the above
9. Capitalization errors are common types of:
A. English errors
B. Omission errors
C. Transposition errors
D. All of the above

10. English errors might include:
- | | |
|---------------------------------|----------------------------|
| A. Errors in family plurals | C. Errors in word division |
| B. Errors in family possessives | D. All of the above |
11. Grammatical errors might include:
- | | |
|------------------|----------------------|
| A. Typing format | C. Spelling |
| B. Word division | D. None of the above |
12. An example of a common grammatical error is:
- | | |
|--------------------------|----------------------|
| A. Spelling | C. Formatting |
| B. Agreement of pronouns | D. None of the above |
13. Formatting considerations include:
- | | |
|----------------------|----------------------|
| A. Placement on page | C. Both A and B |
| B. Punctuation style | D. None of the above |
14. Formatting consideration includes all of the following EXCEPT:
- | | |
|----------------------|-------------------------------------|
| A. Punctuation style | C. Headings |
| B. Spelling errors | D. Consistent paragraph indentation |
15. Common formatting errors include:
- | | |
|--------------------|-----------------------|
| A. Spacing | C. Punctuation styles |
| B. Correct margins | D. All of the above |
16. Which of the following is a special letter part?
- | | |
|------------------------|-------------------|
| A. Salutation | C. Attention line |
| B. Complimentary close | D. Date line |
17. Types of subheadings in a report include:
- | | |
|------------------|-----------------------|
| A. Title | C. Paragraph headings |
| B. Side headings | D. Both B and C |
18. Incorrect placement is an example of:
- | | |
|---------------------|----------------------|
| A. Appearance error | C. Grammatical error |
| B. Style error | D. All of the above |
19. Margins must be:
- | | |
|---------------------------------|----------------------|
| A. Appropriate for kind of work | C. Both A and B |
| B. Equal | D. None of the above |

20. Incorrect numbers, dates, names, and details are examples of:
A. Appearance errors
B. Grammatical errors
C. Author's writing errors
D. All of the above
21. Factors that contribute to content errors include:
A. Omission of a line
B. Errors in printed material
C. Logical order not followed
D. All of the above
22. A pen, a pencil, a folded sheet of paper, a bookmark, or your forefinger are examples of:
A. Supplementary materials
B. Editing material
C. Proofreading guides
D. All of the above
23. Proofreading tools include:
A. Proofreading symbols
B. A word finder book
C. A dictionary
D. All of the above
24. Homophones are not detected by the:
A. Spell checker
B. Proofreader
C. Author
D. None of the above
25. Resources and references required for proofreading include all of the following EXCEPT a:
A. Dictionary
B. Typewriter
C. Word finder
D. Grammar book
26. Omission of a line is a factor that contributes to:
A. Typographical errors
B. Content errors
C. Formatting errors
D. Grammar errors

MATCHING

INSTRUCTIONS: Match the appropriate letter in the blank provided.

- | | | | |
|-----------|----------------------------|----|------------------------|
| _____ 1. | Capitalization | A. | Quality of good editor |
| _____ 2. | Forces slower reading rate | B. | Proofread to verify |
| _____ 3. | Dictionary | C. | Proofreading |
| _____ 4. | Margins | D. | Reading aloud |
| _____ 5. | Attention to detail | E. | Cooperative method |
| _____ 6. | Uses two people | F. | Keyboarding error |
| _____ 7. | Content | G. | English error |
| _____ 8. | Omission of a line | H. | Grammatical errors |
| _____ 9. | Slower rate | I. | Format |
| _____ 10. | Transposing letters | J. | Style includes |
| _____ 11. | Agreement of pronouns | K. | Special letter parts |
| _____ 12. | Placement on page | L. | Appearance error |
| _____ 13. | Subject line | M. | Author's writing error |
| _____ 14. | Content errors | N. | Content error |
| _____ 15. | Noticeable corrections | O. | Proofreading tool |

FILL IN THE BLANK

INSTRUCTIONS: Place the appropriate word or words in the blank provided.

- _____ 1. Understanding proofreader marks is an important skill for a(n) _____.
- _____ 2. _____ is not always done by one person.
- _____ 3. Copy should be proofread _____ times.
- _____ 4. Material should be proofread after it is _____.
- _____ 5. _____ of letters is a common typing mistake.
- _____ 6. _____ errors often occur in names and places.
- _____ 7. Use a _____ to check the spelling of ALL unfamiliar words and words of which you are unsure.
- _____ 8. _____ errors might involve capitalization errors.
- _____ 9. The amount of money a company would lose if a hotel rate was recorded as \$99 a night instead of \$199 a night for 12 people.
- _____ 10. Spacing of material is a consideration in _____.
- _____ 11. Mixed punctuation is a common _____ style.
- _____ 12. The main heading on a report is always _____.
- _____ 13. _____ corrections are never acceptable.
- _____ 14. _____ are aligned at the right of the column.
- _____ 15. When a document is _____ all lines at the right margin are even.
- _____ 16. An example of a(n) _____ error is a content error.
- _____ 17. Proofread a final copy _____ taking it out of the typewriter.
- _____ 18. A _____ does not detect mistakes in tense and usage.

- _____ 19. _____ are available options for proofreaders.
_____ 20. Margins must be as _____ as possible.

ESSAY

1. Explain why good proofreading is important to a business. Give an example of what might happen if you did not catch an error.
2. If you made 2 mistakes on a memo that went to 200 people, how many mistakes would have actually been made?

ACTIVITY 1

- Part 1:** Proofread the full block, standard punctuation letter on the next page, using correct proofreading marks.
- Part 2:** After proofreading, type a mailable copy of the letter.

ALPHA-KEY OFFICE SERVICES

3425 Broadway Avenue
Los Angeles, CA 90028
(213)623-8965

September 30, 19--

M. Patricia Winters
Acctg. Department
Multi-Service Co.
P. O. Box 25861
Dallas, TX 75230

Dear Ms. Winters

As we have not heard from you regarding your payment of 642.14 we are wondering whether we have made a error in shiping your order for the magnetic meda filing system:

Your order was processed on June 26 and our invoice was mailed to you on July third. So far, we have had no response that you have received either the order or our invoice.

If you payment has been sent, please disreguard this letter. However if you have not received your order or have previously settled you account, please let you know so we can correct your error.

Sincerely yours

Leigh Palmer manager

xx

ACTIVITY 2

INSTRUCTIONS: Type the following letter in mailable form from the proofreading marks.

SUPER A TEMPORARY HELP AGENCY

1550 Beltline Road, Dallas, TX 75228
(214) 435-5151

May 24, 19--

Ms. Bettye R. Carmack
Office Manager
Glenn Engineering Service
74 Lakeview Ct.
Dallas, Texas 75227

Dear ^{Ms.} Bettye Carmack:

We have just recently opened a new ^{temp.} help agency at 1550 Beltline ^{Road} in downtown Dallas. We will be able to supply your company with temporary ^{word} info. processing specialists as the need arises.

← Our specialists have been trained to operate the latest word processing equipment and are well versed in the procedures for processing ^{info} in a company your size.

Call use the next time you need a ^{word} temp. info. processing specialists. You will find ← Our services efficient, prompt and inexpensive.

Sincerely Yours,

^{SJ}
Sonja McKenzie
President

XX

ANSWERS

True and False

1. F
2. F
3. T
4. T
5. F
6. T
7. T
8. F
9. F

10. T
11. F
12. T
13. T
14. F
15. F
16. T
17. F

18. F
19. F
20. T
21. F
22. T
23. T
24. F
25. F

Multiple Choice

1. D
2. C
3. C
4. B
5. D
6. C
7. A
8. C
9. A

10. D
11. D
12. B
13. C
14. B
15. D
16. C
17. D
18. A

19. C
20. C
21. D
22. C
23. D
24. A
25. B
26. B

Matching

- | | | |
|------|-------|-------|
| 1. G | 6. E | 11. H |
| 2. D | 7. B | 12. I |
| 3. O | 8. N | 13. K |
| 4. J | 9. C | 14. M |
| 5. A | 10. F | 15. L |

Fill in the Blank

- | | |
|---------------------------------|----------------------|
| 1. Editor | 11. Punctuation |
| 2. Proofreading | 12. Centered |
| 3. Three | 13. Noticeable |
| 4. Cold | 14. Column headings |
| 5. Transposing | 15. Justified |
| 6. Spelling | 16. Author's writing |
| 7. Dictionary or reference book | 17. Before |
| 8. English | 18. Spell checker |
| 9. \$1200 | 19. Grammar checkers |
| 10. Style | 20. Even |

Essay

1. Evaluated to the satisfaction of the instructor.
2. 400

Activity 1

Part 1

ALPHA-KEY OFFICE SERVICES
3425 Broadway Avenue
Los Angeles, CA 90028
(213)623-8965

September 30, 19--

M. Patricia Winters
Acctg. Department
Multi-Service Co.
P. O. Box 25861
Dallas, Texas 75230

Dear Ms. Winters:

As we have not heard from you regarding your payment of \$642.14 we are wondering whether we have made a error in shipping your order for the magnetic media filing system.

Your order was processed on June 26 and our invoice was mailed to you on July 3. So far, we have had no response that you have received either the order or our invoice.

If your payment has been sent, please disregard this letter. However, if you have not received your order or have previously settled your account, please let us know so we can correct your error.

Sincerely yours,

Leigh Palmer, manager

xx

Part 2

ALPHA-KEY OFFICE SERVICES
3425 Broadway Avenue
Los Angeles, CA 90028
(213)623-8965

September 30, 19--

Ms. Patricia Winters
Accounting Department
Multi-Service Company
P. O. Box 25861
Dallas, TX 75230

Dear Ms. Winters:

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If your payment has been sent, please disregard this letter. However, if you have not received your order or have previously settled your account, please let us know so we can correct our error.

Sincerely yours,

Leigh Palmer, Manager

xx

Activity 2

SUPER A TEMPORARY HELP AGENCY

1550 Beltline Road, Dallas, TX 75228
(214) 435-5151

May 24, 19--

Ms. Bettye R. Carmack
Office Manager
Glenn Engineering Service
74 Lakeview Court
Dallas, TX 75227

Dear Ms. Carmack:

I have just recently opened a new temporary help agency at 1550 Beltline Road in downtown Dallas. We will be able to supply your company with temporary word processing specialists as the need arises.

Our specialists have been trained to operate the latest word processing equipment and are well-versed in the procedures for processing information in a company your size.

Call us the next time you need temporary word processing specialists. You will find our services efficient, prompt, and inexpensive.

Sincerely yours,

Sonja McKenzie
President

xx

TRUE AND FALSE

1. Input is part of the document cycle.
2. The cursor indicates where the last character was typed.
3. Electronic mail is not a function of information processing.
4. Acceptable word division is a requirement of a mailable business document.
5. The body of a table consists of columns.
6. Minutes provide information about what happened at a specific meeting.
7. A title page provides a complete listing of materials that were used in preparing the body of a report.
8. An abstract provides a quick overview of the contents of a report.
9. Footnotes in business reports never use the end note system.
10. The body of a business report is triple spaced.
11. The abstract is part of a business report.
12. Side headings are typed in all capital letters.
13. Unbound reports use a 2-inch left and right margin.
14. The design of a form should be as simple as possible.
15. Memorandums have a 2-inch top margin.
16. On a large envelope begin typing on line 12 or 2 inches from the top.
17. At least 4 lines must be carried over to the second page of a two-page letter.
18. Form letters are used for routine or large volume correspondence.
19. Open punctuation saves time for the typist.
20. In the AMS Simplified letter, the subject line is keyed in all caps.
21. The second page heading of a letter contains the name of the addressee, the page number, and the date.
22. The word "enclosure" must always be spelled out in a business letter.
23. The subject line provides the primary theme of the letter.
24. The body of the letter is always double spaced.

25. The signature line (complimentary close) is placed a double space below the last line of the body of the letter.
26. Memorandums require few formatting requirements.
27. Formats are standard and do not vary from organization to organization.

MULTIPLE CHOICE

1. Input, processing, output, and distribution are steps in:
A. The information cycle
B. The document cycle
C. The production cycle
D. All of the above
2. Information processing includes which of the following?
A. Memos
B. Form documents
C. Electronic mail
D. All of the above
3. Requirements of a mailable business document include all of the following EXCEPT:
A. Two-inch side margins
B. Correct spelling
C. Correct punctuation
D. Error free
4. Collecting/creating, recording, manipulating, storing, and printing data are steps involved in:
A. Information processing
B. Word processing
C. Document retrieval
D. Data entry
5. A standard part of the microcomputer keyboard might include:
A. A CPU
B. A CRT
C. A screen
D. Alphanumeric keys
6. Electronic mail utilizes a(n):
A. Electric typewriter
B. Modem
C. Electronic typewriter
D. None of the above
7. The body of a table consists of:
A. Columns
B. Paragraphs
C. References
D. All of the above
8. Official and permanent records of a meeting are called:
A. Reports
B. Form letters
C. Minutes
D. Abstracts
9. A complete listing of materials used in a report is contained in the:
A. Table of contents
B. Title page
C. Appendix
D. Bibliography

10. The body of a business report should be:
- A. Single spaced
 - B. Triple spaced
 - C. Double spaced
 - D. None of the above
11. How many blank spaces follow the title of a report?
- A. Three
 - B. Two
 - C. One
 - D. Four
12. What provides additional information needed to clarify or support a report?
- A. Appendix
 - B. Footnotes
 - C. Bibliography
 - D. All of the above
13. In a business report the paragraphs are indented:
- A. Ten spaces
 - B. Five spaces
 - C. Fifteen spaces
 - D. Three spaces
14. Capitalize only the first word in a:
- A. Title
 - B. Side heading
 - C. Paragraph heading
 - D. Subheading
15. Top margins used for an unbound report are:
- A. Three inches
 - B. One and one half inch
 - C. One inch
 - D. Two inches
16. Side margins for a leftbound report are:
- A. 1" left and right
 - B. 1 1/2" left and 1" right
 - C. 1" left and 1 1/2" right
 - D. 2" left and 1" right
17. Format for a form letter should be:
- A. Simple
 - B. Complicated
 - C. Varied
 - D. All of the above
18. What is commonly used in the office to efficiently communicate routine information?
- A. Reports
 - B. Letters
 - C. Memos
 - D. Tables
19. The _____ is typed two spaces below the date line.
- A. Inside address
 - B. Mailing notation
 - C. Addressee notation
 - D. None of the above

20. The second page heading of a letter includes which of the following?
- | | |
|-------------------------|---------------------|
| A. The addressee's name | C. The date |
| B. The page number | D. All of the above |
21. Personal and social business letters are often referred to as:
- | | |
|------------------------------|-----------------|
| A. Executive correspondence | C. Form letters |
| B. Government correspondence | D. Memos |
22. In mixed punctuation there is a:
- | | |
|--|----------------------|
| A. Colon after the salutation | C. Both A and B |
| B. Comma after the complimentary closing | D. None of the above |
23. The letter style that is flush with the left margin is:
- | | |
|-------------------|-------------------|
| A. Full block | C. AMS Simplified |
| B. Modified block | D. Both A and C |
24. The letter part used to include an omitted detail is a(n):
- | | |
|-------------------|---------------|
| A. Attention line | C. Postscript |
| B. Subject line | D. Enclosure |
25. The second page heading of a letter is placed on:
- | | |
|-----------------|----------------------|
| A. Line 6 or 7 | C. Line 14 or 15 |
| B. Line 9 or 10 | D. None of the above |
26. Which of the following omits the copy notation on the original copy?
- | | |
|------------------------|----------------------|
| A. Copy notation | C. Both A and B |
| B. Blind copy notation | D. None of the above |
27. Which of the following is used as a check to make sure that everything is enclosed in the letter?
- | | |
|-------------------|-----------------------|
| A. Subject line | C. Enclosure notation |
| B. Attention line | D. Postscript |
28. Which letter part is double spaced below the salutation?
- | | |
|-----------------------|------------------------|
| A. Attention line | C. Complimentary close |
| B. Reference initials | D. Subject line |
29. Postal service notations include:
- | | |
|---------------------|---------------------|
| A. Special delivery | C. Registered mail |
| B. Insured mail | D. All of the above |

30. The body of the business letter is always:
- | | |
|------------------|----------------------|
| A. Double spaced | C. Triple spaced |
| B. Single spaced | D. None of the above |
31. Business reports _____ have footnotes.
- | | |
|-----------|---------------|
| A. Always | C. Frequently |
| B. Seldom | D. Never |
32. Business documents include all but:
- | | |
|---------------------|---------------------|
| A. Bibliography | C. Memorandums |
| B. Business letters | D. Business reports |
33. Purchase orders are examples of:
- | | |
|----------------|----------------------|
| A. Memorandums | C. Business reports |
| B. Forms | D. None of the above |
34. When formatting, the copy should be:
- | | |
|-------------|---------------|
| A. Balanced | C. Functional |
| B. Indented | D. Both A & C |
35. Methods of highlighting points of emphasis include all of the following EXCEPT:
- | | |
|-------------------|----------------------|
| A. Capitalization | C. Indentions |
| B. Underlining | D. None of the above |
36. Parts of a business letter include all of the following EXCEPT:
- | | |
|----------------------|-------------------|
| A. Letterhead | C. Dateline |
| B. Mission statement | D. Inside address |
37. A letterhead may include all of the following EXCEPT:
- | | |
|-------------------|--------------------------|
| A. Company name | C. Name of CEO |
| B. Street address | D. Name of the addressee |
38. The dateline is double spaced below the letterhead between:
- | | |
|---------------|----------------|
| A. Lines 4-8 | C. Lines 12-15 |
| B. Lines 9-11 | D. Lines 15-18 |
39. Military format for the dateline would appear as:
- | | |
|-----------------|-----------------|
| A. July 4 1989 | C. 4 July 1989 |
| B. July 4, 1989 | D. 4 July, 1989 |

40. The following are characteristics of the AMS Simplified format EXCEPT:
- A. Full blocked to the left
 - B. Using a standard complimentary closing
 - C. Neither A nor B
 - D. Both A and B
41. In typing a mailing address, the correct appearance would be:
- A. 509 West 10th Street
 - B. 509 W. 10th Street
 - C. 509 West Tenth Street
 - D. None of the above
42. The inside address is usually typed _____ lines below the dateline.
- A. 4 to 12
 - B. 8 to 12
 - C. 10
 - D. None of the above
43. The name is generally typed _____ lines below the complimentary close.
- A. 2
 - B. 4
 - C. 6
 - D. 8
44. The current trend for typing a subject line is:
- A. Type the word "Subject" before the notation
 - B. Type the word "Attention" before the notation
 - C. Leave off the word "Subject" and type the line in all capital letters
 - D. None of the above
45. The following are acceptable examples for indicating multiple enclosures EXCEPT:
- A. Enclosures
 - B. 3 Enclosures
 - C. Enc. 3
 - D. All of the above are acceptable
46. The notation "pc John Brown" indicates:
- A. A personal copy goes to John Brown
 - B. A photocopy goes to John Brown
 - C. John Brown should personally call the person sending the letter
 - D. None of the above
47. The full-blocked letter style has all of the following characteristics EXCEPT:
- A. Difficult to use and understand
 - B. All parts of the letter begin flush with the left margin
 - C. It saves time in moving from one part of the letter to another
 - D. All of the above are characteristics

MATCHING

INSTRUCTIONS: Match the proper letter in the blank provided. (Some terms may be used more than once.)

- | | | |
|-----------------------------|------------------------|--------------------------------------|
| A. Reference initial | G. Form letter | O. Parts of a formal business report |
| B. Business document | H. Mailing notation | P. Minutes of meeting |
| C. Parts of business letter | I. Memo heading | Q. Mixed punctuation |
| D. Attention line | J. Leftbound report | R. Blind copy notation |
| E. Second page heading | K. Complimentary close | S. Document cycle |
| F. AMS Simplified | L. Full-blocked style | T. Mailability Requirement |
| | M. Open punctuation | |
| | N. Semi-blocked style | |

- | | |
|---|--|
| _____ 1. Business letters | _____ 16. Contains no salutation |
| _____ 2. Memos | _____ 17. No punctuation after salutation |
| _____ 3. Forms | _____ 18. Comma follows complimentary close |
| _____ 4. Reports | _____ 19. Chosen from standardized copy |
| _____ 5. Inside address | _____ 20. Typed in all capital letters below stamp |
| _____ 6. Salutation | _____ 21. To, from, subject, date |
| _____ 7. Body of letter | _____ 22. Use 1 1/2-inch left margin and 1-inch right margin |
| _____ 8. Reference initials | _____ 23. Table of contents |
| _____ 9. Double spaced below signature line | _____ 24. Appendix |
| _____ 10. Double spaced below inside address | _____ 25. Provide information concerning a specific meeting |
| _____ 11. Sincerely yours | _____ 26. Correct spelling |
| _____ 12. Omits copy notation on original | _____ 27. Correct capitalization |
| _____ 13. Keyed on sixth or seventh line from the top | _____ 28. Processing |
| _____ 14. All parts flush with right margin | _____ 29. Output |
| _____ 15. Signature line begins at center | _____ 30. Distribution |

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. Input is part of the _____ cycle.
- _____ 2. The _____ indicates where the next character will be keyed in.
- _____ 3. Electronic mail is a function of _____ processing.
- _____ 4. Acceptable word division is a requirement of a _____ business document.
- _____ 5. The body of the _____ consists of columns.
- _____ 6. _____ provide information about what happened at a specific meeting.
- _____ 7. A _____ provides a complete listing of materials that were used in preparing the body of a report.
- _____ 8. An _____ provides a quick overview of the contents of a report.
- _____ 9. The body of a business report is _____ spaced.
- _____ 10. Side headings are typed in _____ letters.
- _____ 11. Unbound reports use a _____-inch left and right margin.
- _____ 12. Sometimes formats are found in an organization's _____ manual.
- _____ 13. Memorandums have a _____-inch top margin.
- _____ 14. On a _____ envelope, begin typing on line 12 or 2 inches from the top.
- _____ 15. At least _____ lines must be carried over to the second page of a two-page letter.
- _____ 16. _____ letters are used for routine or large volume correspondence.
- _____ 17. _____ punctuation saves time for the typist.
- _____ 18. In the _____ letter style, the subject line is keyed in all caps.

- _____ 19. The second page heading of a letter contains _____, _____, and _____.
- _____ 20. The _____ provides the primary theme of the letter.
- _____ 21. Business documents are categorized by format and _____ requirements.
- _____ 22. Memorandums are usually considered as informal _____.
- _____ 23. Minutes of meetings are examples of the _____ type of documents.
- _____ 24. _____ concerns placement of text on a page.
- _____ 25. Formatting involves _____ points of emphasis in the message.

-

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. T | 10. F | 19. T |
| 2. F | 11. T | 20. T |
| 3. F | 12. T | 21. T |
| 4. T | 13. F | 22. F |
| 5. T | 14. T | 23. T |
| 6. T | 15. F | 24. F |
| 7. F | 16. F | 25. F |
| 8. T | 17. F | 26. T |
| 9. F | 18. T | 27. F |

Multiple Choice

- | | | | |
|-------|-------|-------|-------|
| 1. B | 13. B | 25. A | 37. D |
| 2. D | 14. C | 26. B | 38. C |
| 3. A | 15. D | 27. C | 39. C |
| 4. A | 16. B | 28. D | 40. B |
| 5. D | 17. A | 29. D | 41. C |
| 6. B | 18. C | 30. B | 42. A |
| 7. A | 19. B | 31. C | 43. B |
| 8. C | 20. D | 32. A | 44. C |
| 9. D | 21. A | 33. B | 45. D |
| 10. C | 22. C | 34. D | 46. B |
| 11. B | 23. D | 35. D | 47. A |
| 12. A | 24. C | 36. B | |

Matching

- | | | |
|-------|-------|-------|
| 1. B | 11. K | 21. I |
| 2. B | 12. R | 22. J |
| 3. B | 13. E | 23. O |
| 4. B | 14. L | 24. O |
| 5. C | 15. N | 25. P |
| 6. C | 16. F | 26. T |
| 7. C | 17. M | 27. T |
| 8. C | 18. Q | 28. S |
| 9. A | 19. G | 29. S |
| 10. D | 20. H | 30. S |

Fill in the Blank

- | | | |
|-----------------|--------------------|--|
| 1. Document | 10. All capital | 19. Name of addressee, page number, and date |
| 2. Cursor | 11. One | |
| 3. Information | 12. Procedures | 20. Subject line |
| 4. Mailable | 13. One | 21. Production |
| 5. Table | 14. Small | 22. Letters |
| 6. Minutes | 15. Two | 23. Business report |
| 7. Bibliography | 16. Form | 24. Formatting |
| 8. Abstract | 17. Open | 25. Highlighting |
| 9. Double | 18. AMS Simplified | |

Essay

1.
 - 1) Full-blocked style is one of the most popular because its ease of use makes it time-efficient.
 - 2) Semi-blocked or modified blocked letter style is also a very popular style in which the date line and the complimentary closing start at the center. Paragraphs may or may not be indented.
 - 3) AMS Simplified is the fastest letter style to type. All parts are blocked at the left margin, it contains no salutation or complimentary close, and uses a subject line.
2. The document cycle includes:
 - 1) Input--entered into the computer
 - 2) Processing--involves editing, revising, combining, rearranging, formatting, etc.
 - 3) Output--completed document is printed
 - 4) Distribution of information--mailing or delivery

COMPETENCY MATRIX OF TEST BANK QUESTIONS

SECTION II

SECTION II		QUESTION TYPES				
Unit	Comp.	T/F	MC	Match	Fill-in	Essay
1	1	7	2,3,9	2,4,6,7,10,11 14,18,20,22,23	4,5	1,2
	2	1-4,6,8-13 22,23	1,3-6,8-19 24-27,36-38 40-46,48	1,5,8,12,13,17 19,20,22,23	1-3,6-10,12 15-17,19	3
	3	5	7	9,20,22,23		
	4			20,22,23		
	5	14-21,24,25	20-23,28-35	2-4,7,10,11,14 18,20,22,23	11,13,14,18,20	4
2	1				9	1,2
	2	1-4,7,17,21, 22,25	1-3,22,23	3,5	1-4,7,17,19	
	3	5,6,8-16,18-20 23,24	4-21,24-26	1,2,4,6-15	5,6,8,10-16, 18,20	
3	1	1,2	1		1,2	
	2	3,4,7,13,15,16 22	2-6,12,20,41-43, 45		4	
	3	5,9,10,12,16,17 19-21,23-27	10,11,13-17,19, 22-31,34,35, 38-40, 44-47		5,7-15,17-20, 24-26	
	4	6,8,11,13,15,18	7-9,18,21,33,36, 37,40		3,6,7,16,21-23	1,2

TRUE AND FALSE

1. Checking documents for initials or release marks indicating that material is released for storage is known as indexing.
2. Deciding where and in what type of filing system correspondence should be stored is inspecting.
3. Marking units of correspondence with names or numbers is called coding.
4. Cross-referencing refers the user to another location for the desired file.
5. Surname refers to the first or given name of an individual.
6. Storing is the process of arranging records according to a predetermined sequence.
7. Sort can involve both rough and fine sort.
8. Sorting is the process of organizing or filing records in a file according to alphabet, subject, date or number.
9. In alphabetic filing a married woman's legal name is considered her first name, her middle name, and her husband's surname.
10. Indexing is marking a caption on correspondence.
11. Inspecting consists of checking for initials releasing material for filing.
12. Periodic transfer is the check-out system for removing materials from a file.
13. Charge out is removal of papers from active to inactive files at stated intervals.
14. Incoming correspondence is correspondence which originates outside the office.
15. Micrographics is the total information system including filing, filming and retrieval.
16. Primary guides are used to show major divisions in a file.
17. The process of controlling organizational information from its creation through its final disposal is called filing.
18. The physical process of classifying records so that they may be placed into their respective storage containers is known as records management.
19. Release marks show that a document is ready to be taken out of files for disposal.
20. Fine sort means sorting records into the exact order for filing.
21. The primary purpose of filing systems is to retrieve records quickly and efficiently.
22. Alphabetic filing is an example of an indirect access filing system.

- 23. Archiving is the technique of maintaining records.
- 24. Coding is deciding where and in what type of filing system correspondence should be stored.
- 25. Sorting is the process of arranging records in proper filing order.
- 26. Another name for filing is storing.
- 27. If a worker begins a new job he/she should convert the existing filing system in the business to the ARMA filing rules.
- 28. Active records are those frequently used.

MULTIPLE CHOICE

1. Some of the causes of misfiling are:
 - A. Carelessness
 - B. Placing one folder inside another
 - C. Leaving a paper clip attached that has picked up unrelated documents
 - D. All of the above
2. Which is NOT a type of file folder?
 - A. Miscellaneous
 - B. Individual
 - C. Special
 - D. Guide
3. A check-out system used for removing materials from a file is:
 - A. Charge-out system
 - B. Numeric system
 - C. Direct access system
 - D. Indirect access system
4. The method of filing, organized like a dictionary is:
 - A. Subject
 - B. Geographic
 - C. Numeric
 - D. Alphabetic
5. Which of the following require use of cross-referencing?
 - A. Firms and organizations that use well-known acronyms
 - B. Business names composed of two or more surnames
 - C. Names that are foreign or unusual
 - D. All of the above
6. Sheets of film that can store the reduced image of many pages of documents are known as:
 - A. Ultrafiche
 - B. Microform
 - C. Microfiche
 - D. Micrographics
7. The file medium upon which the smallest images of a document are stored is known as:
 - A. Ultrafiche
 - B. Microform
 - C. Microfiche
 - D. Micrographics
8. Reducing documents to minute images in order to store them is known as:
 - A. Ultrafiche
 - B. Microform
 - C. Microfiche
 - D. Micrographics

9. The storing of records according to a specific organizational design, using basic filing supplies and equipment is known as:
- A. Decentralized file storage system
 - B. Filing system
 - C. Direct access system
 - D. Indirect access system
10. A filing system that permits the user to go directly to the files to locate a record without first referring to an index is known as:
- A. Terminal digit system
 - B. Consecutive numeric system
 - C. Direct access system
 - D. Indirect access system
11. A filing system, such as numeric or subject system, in which the user must refer to an index before records can be found is known as:
- A. Terminal-digit system
 - B. Indirect access system
 - C. Direct access system
 - D. Consecutive numeric system
12. A storage system in which files are placed in different locations, either near the user or where space is available.
- A. Centralized file storage system
 - B. Direct access storage system
 - C. Decentralized file storage system
 - D. Indirect access storage system
13. A storage system in which all company files are located in one, convenient area.
- A. Centralized file storage system
 - B. Direct access storage system
 - C. Decentralized file storage system
 - D. Indirect access storage system
14. Which date on a letter would be on top in a folder when correctly filed for correspondence filing?
- A. May 15
 - B. April 5
 - C. March 2
 - D. June 25
15. An advantage of the direct access system is:
- A. Good for storing large volume records
 - B. Confidentiality is provided for all records
 - C. File can be retrieved under a coded name
 - D. Provides accuracy in filing and facilitates retrieval
16. A disadvantage of a direct access system is:
- A. Several different sets of files are needed for control
 - B. Misfiled records are more difficult to locate
 - C. A code has to be obtained from an index before a record may be retrieved
 - D. Similar or identical names may cause confusion

17. An advantage of an indirect access system is:
- A. Guides used for common names allow speedy filing and retrieval of records
 - B. Provides accuracy in filing and facilitates retrieval
 - C. It is a quick and easy retrieval system for a small number of records
 - D. Several different sets of files are needed
18. _____ are those records that are helpful in operation of a business for a limited period.
- A. Important records
 - B. Vital records
 - C. Useful records
 - D. Nonessential records
19. _____ are useful only temporarily in business operations.
- A. Important records
 - B. Vital records
 - C. Useful records
 - D. Nonessential records

Indicate the correct alphabetical order of each of the following:

20. 1. John Henry Brown
2. S. Browning Martinez
3. Brown
4. Mrs. William Marcus Brock (Sandra Bennet)
- A. 4, 1, 2, 3
 - B. 4, 3, 1, 2
 - C. 3, 1, 2, 4
 - D. 3, 4, 1, 2
21. 1. Mrs. J. C. Brockman (Roma Jean)
2. Paul H. Bronman
3. Susan St. James
4. Lynda De la Rosa
- A. 1, 2, 4, 3
 - B. 1, 2, 3, 4
 - C. 2, 1, 4, 3
 - D. 2, 1, 3, 4
22. 1. Paul H. Looney, III
2. Paul H. Looney, Sr.
3. Mrs. J. C. Brockman (Roma Jean)
4. Mrs. William Marcus Brock (Sandra Bennett)
- A. 3, 4, 2, 1
 - B. 4, 3, 1, 2
 - C. 4, 3, 2, 1
 - D. 1, 2, 4, 3
23. 1. Sister Beatrice
2. Jimmy Belton
3. Elizabeth Aston-Sullivan
4. Carol O'Sullivan
- A. 3, 1, 2, 4
 - B. 1, 2, 4, 3
 - C. 2, 1, 4, 3
 - D. 3, 2, 4, 1

OSS/Testbank/Section IV
Unit 1: Alphabetical Filing

- | | |
|---|---|
| <p>24. 1. Jones & Jones, Inc.
2. Bob Jones Company
3. Martin Jones Store</p> <p>A. 1, 2, 3
B. 2, 3, 1
C. 3, 1, 2
D. 2, 1, 3</p> | <p>29. 1. Earl Johnston
2. Mary Johnson
3. Robert Johns</p> <p>A. 1, 3, 2
B. 2, 1, 3
C. 3, 2, 1
D. 1, 2, 3</p> |
| <p>25. 1. Computerworld Magazine
2. Charleston Christian Church
3. Elsa National Bank</p> <p>A. 1, 2, 3
B. 2, 1, 3
C. 3, 1, 2
D. 2, 3, 1</p> | <p>30. 1. Carla Brown
2. Carol Browne
3. Cathy Brown</p> <p>A. 3, 2, 1
B. 1, 3, 2
C. 2, 1, 3
D. 1, 2, 3</p> |
| <p>26. 1. U.S. Department of Justice
2. U.S. Attorney General
3. Federal Bureau of Investigation</p> <p>A. 3, 2, 1
B. 1, 3, 2
C. 1, 2, 3
D. 2, 3, 1</p> | <p>31. 1. Thomas Ross Davison
2. Thomas R. Davidson
3. Theodore Robert Davisen</p> <p>A. 2, 1, 3
B. 3, 2, 1
C. 1, 2, 3
D. 2, 3, 1</p> |
| <p>27. 1. The House of Hair Salon
2. Uptown & Downtown Drive-In
3. Plumber & Carpenter Store</p> <p>A. 1, 3, 2
B. 1, 2, 3
C. 3, 2, 1
D. 2, 1, 3</p> | <p>32. 1. M. Elena Gonzalez
2. Mary Sue Gonzales
3. Mario Jose Gonzalez</p> <p>A. 1, 3, 2
B. 2, 3, 1
C. 2, 1, 3
D. 3, 1, 2</p> |
| <p>28. 1. Sears and Roebuck Co.
2. Smith and Jones Auto Repair
3. The Ultra Nail Salon</p> <p>A. 2, 3, 1
B. 3, 1, 2
C. 1, 2, 3
D. 3, 2, 1</p> | <p>33. 1. Juan Rodriguez
2. Construction
3. Dallas Tribune Ladies Home Journal</p> <p>A. 2, 1, 3
B. 2, 3, 1
C. 3, 2, 1
D. 3, 1, 2</p> |

OSS/Testbank/Section IV
Unit 1: Alphabetical Filing

34. 1. M. J. Rideout
2. Right-o-way Restaurant
3. Right-way Foods

A. 3, 2, 1
B. 1, 3, 2
C. 1, 2, 3
D. 2, 3, 1

35. 1. A & B Mufflers
2. CAF Cafe
3. Right & Left Country Store

A. 3, 2, 1
B. 2, 1, 3
C. 1, 2, 3
D. 2, 3, 1

36. 1. John's Mobile Park
2. Robert K. Johns
3. John and Peter Inc.

A. 2, 3, 1
B. 1, 2, 3
C. 3, 2, 1
D. 3, 1, 2

37. 1. Points-a-Far Travel Agency
2. Rendon & Rivas Insurance
3. George Martinez Corp.

A. 3, 1, 2
B. 3, 2, 1
C. 2, 3, 1
D. 2, 1, 3

38. 1. Father Tim
2. S. Michael Smith, Sr.
3. S. Michael Smith, Jr.

A. 3, 2, 1
B. 2, 3, 1
C. 1, 3, 2
D. 1, 2, 3

39. 1. Mrs. Suzanne Jane Flowers
2. Miss B. T. Flowers
3. Flowers By Catherine

A. 3, 2, 1
B. 2, 3, 1
C. 1, 3, 2
D. 1, 2, 3

40. 1. Dr. Homer Garcia
2. Father Ralph Sweeney
3. Father Randolph

A. 2, 1, 3
B. 2, 3, 1
C. 3, 2, 1
D. 3, 1, 2

41. 1. Professor William Martin
2. Doctor's Rest Haven
3. Professor's Book Company

A. 3, 1, 2
B. 2, 1, 3
C. 2, 3, 1
D. 1, 2, 3

42. 1. Mrs. Hilda Cruz Rodriguez
(Mrs. Javier J.)
2. Ms. Mary Janet Allen
3. Mrs. Betty Banks
Clothier

A. 2, 3, 1
B. 3, 2, 1
C. 2, 1, 3
D. 1, 2, 3

43. 1. Mrs. Homer Santos (Elvia
Maria Gonzalez)
2. Ms. Ellen Smyth's Shoe
Town
3. Mrs. Betty Margaret
Williams

A. 2, 1, 3
B. 3, 2, 1
C. 1, 2, 3
D. 2, 3, 1

- | | |
|--|--|
| <p>44. 1. Mary de la Garza
 2. Rudy De Leon
 3. La Verne's Gifts</p> <p> A. 3, 2, 1
 B. 1, 2, 3
 C. 2, 1, 3
 D. 3, 1, 2</p> | <p>49. 1. House of Pizza
 2. Alamina, CA
 3. House of Pizza
 Santeriz, CA
 House of Pizza
 Walrus, CA</p> <p> A. 2, 1, 3
 B. 2, 3, 1
 C. 1, 3, 2
 D. 1, 2, 3</p> |
| <p>45. 1. Mary Katherine FitzWater
 2. Barry Barnett Fitzwater
 3. Anna FitzGerald</p> <p> A. 3, 1, 2
 B. 2, 1, 3
 C. 1, 2, 3
 D. 3, 2, 1</p> | <p>50. 1. House of Fashions
 715 15th Street
 Macabee, TX
 2. House of Fashions
 15 10th Street
 Macabee, TX
 3. House of Fashions
 1009 2nd Street
 Macabee, TX</p> <p> A. 3, 1, 2
 B. 3, 2, 1
 C. 2, 1, 3
 D. 1, 2, 3</p> |
| <p>46. 1. Paul de Jesus Salon
 2. Franklin Saint John
 3. Saint John</p> <p> A. 3, 1, 2
 B. 2, 3, 1
 C. 3, 2, 1
 D. 1, 2, 3</p> | <p>51. 1. Robert Edward Carter, Sr.
 1519 Sunset Drive
 Hollywood, NM
 2. Robert Edward Carter, II
 719 Fairlane Boulevard
 Moonlight, NE
 3. Robert Edward Carter, III
 104 Whitewing
 Airdale, MO</p> <p> A. 1, 2, 3
 B. 3, 2, 1
 C. 2, 3, 1
 D. 3, 1, 2</p> |
| <p>47. 1. Paul Edward Van Der Gast
 2. Mary Louise Vandergast
 3. Courtney Ann Vonders</p> <p> A. 2, 1, 3
 B. 3, 2, 1
 C. 2, 3, 1
 D. 1, 2, 3</p> | <p>52. 1. 17th and James Pharmacy
 2. 5th and Marvel Grocery
 3. Five Thousand Boutique</p> <p> A. 1, 3, 2
 B. 3, 2, 1
 C. 2, 3, 1
 D. 3, 1, 2</p> |
| <p>48. 1. Maria Gonzalez
 1115 Erie Street
 Roanoke, VA 77714
 2. Maria Gonzalez
 709 Blue Jay Drive
 Roanoke, WA 62314
 3. Maria Gonzalez
 109 Wallace Ave.
 Roanoke, NY</p> <p> A. 3, 1, 2
 B. 2, 1, 3
 C. 1, 2, 3
 D. 2, 3, 1</p> | |

OSS/Testbank/Section IV
Unit 1: Alphabetical Filing

53. 1. The 4th Street Drive-In
2. The 4th Day Mission
3. 4 Hour Bakery

A. 2, 3, 1
B. 1, 2, 3
C. 2, 1, 3
D. 3, 1, 2

54. 1. Hotel Marshall
2. Marshall University
3. Marshall Fields Inc.

A. 3, 2, 1
B. 2, 3, 1
C. 1, 3, 2
D. 1, 2, 3

55. 1. The Association for the Deaf
2. Seventh Day Baptist Church
3. National Bank of Elmwood

A. 1, 2, 3
B. 1, 3, 2
C. 3, 2, 1
D. 3, 1, 2

56. 1. Rooker University
2. University of Rochester
3. Ruder's University

A. 3, 1, 2
B. 1, 3, 2
C. 2, 1, 3
D. 1, 2, 3

57. 1. National Foundation of Singers
2. National Federation of Florists
3. National Parks & Wildflowers

A. 3, 1, 2
B. 1, 2, 3
C. 2, 3, 1
D. 2, 1, 3

58. 1. San Antonio Express
2. San Juan Restaurant
3. Santa Maria Mission

A. 1, 2, 3
B. 2, 3, 1
C. 1, 3, 2
D. 3, 1, 2

59. 1. South East Cleaners
2. Southeastern Accountants
3. Southern Metal Company

A. 2, 3, 1
B. 3, 2, 1
C. 1, 2, 3
D. 1, 3, 2

60. 1. Marla Richards-Smith
2. Ann Owen-Young
3. Robert Francis Northerly-East

A. 1, 2, 3
B. 3, 2, 1
C. 3, 1, 2
D. 2, 1, 3

61. 1. Ship-to-Shore Restaurant
2. Tune-and-Note Music Company
3. North-east Airlines

A. 2, 1, 3
B. 3, 2, 1
C. 1, 2, 3
D. 3, 1, 2

62. 1. Father Edward
2. Jane Saint Claire
3. E-Z Way Laundromat

A. 3, 2, 1
B. 3, 1, 2
C. 1, 2, 3
D. 2, 1, 3

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63. 1. Jas. Young, Ph.D.
2. M. V. Ramirez
3. John C. Evans

A. 3, 1, 2
B. 1, 2, 3
C. 3, 2, 1
D. 2, 3, 1

64. 1. Michael Anthony-Jones
2. North Travel Agency
3. KRO Radio

A. 2, 3, 1
B. 3, 1, 2
C. 3, 2, 1
D. 1, 2, 3

65. 1. Takeda Yoichi
2. Northwest Publishing
Company
3. United Shopping World

A. 1, 3, 2
B. 2, 3, 1
C. 1, 2, 3
D. 3, 2, 1

66. 1. Texas Department of
Recreation
2. University of Oregon
3. EZ Loan Company

A. 2, 3, 1
B. 3, 2, 1
C. 3, 1, 2
D. 1, 3, 2

67. 1. Jones & Jones
2. Ralph & Sons
3. Gonzalez Brothers

A. 2, 3, 1
B. 3, 1, 2
C. 3, 2, 1
D. 1, 2, 3

68. 1. Mary Wright, DDS
2. Father Felix Flores
3. Maria De La Garza

A. 1, 2, 3
B. 1, 3, 2
C. 3, 2, 1
D. 3, 1, 2

69. 1. Hilda DeLeon
2. O'Grady's Sports World
3. Mrs. Janet Evans

A. 2, 1, 3
B. 1, 3, 2
C. 3, 2, 1
D. 1, 2, 3

70. 1. Jos. Paul McCarthy
2. El Paso Power Co.
3. #1 Ceramic Shop

A. 3, 1, 2
B. 2, 1, 3
C. 2, 3, 1
D. 1, 2, 3

MATCHING 1

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- A. Active records
- B. Alphabetizing
- C. Archiving
- D. ARMA
- E. Caption
- F. Charge-out
- G. Coding
- H. Correspondence
- I. Cross-referencing
- J. Filing
- K. Folder
- L. Follow-up
- M. Geographic filing

- N. Guides
- O. Indexing
- P. Individual folder
- Q. Information
- R. Information management
- S. Inspecting
- T. Key unit
- U. Label
- V. Microform
- W. Microfiche
- X. Miscellaneous folder
- Y. Micrographics
- Z. Periodic transfer

- _____ 1. Written communication between a company and other businesses.
- _____ 2. The systematic process of classifying, arranging, and sorting information so that it can be easily retrieved.
- _____ 3. Gummed paper that is attached to the tab of a folder.

- _____ 4. A field or category within a record that is used to identify, select, or sort records.
- _____ 5. The technique of maintaining records.
- _____ 6. A file organized by the date of the month to serve as a daily memorandum of tasks.
- _____ 7. Sheets of film that can sort the reduced images of many pages of documents.

- _____ 8. Marking units in a filing segment.
- _____ 9. Knowledge that has been processed or organized so that it can be retrieved and used easily.
- _____ 10. A method of moving records from the active to the inactive files at fixed intervals of time.
- _____ 11. Messages that refer the user to another location for the desired file.
- _____ 12. The container in which papers or materials are kept in a file drawer.
- _____ 13. A folder that holds correspondence for which there is no individual folder.
- _____ 14. Filing records in a file according to the alphabet, subject, date, or number.
- _____ 15. A segment of a name used in determining the alphabetic order in a filing system.
- _____ 16. Arranging records according to a predetermined sequence.
- _____ 17. Filing records by geographic location.
- _____ 18. Records that must be accessible because they are used regularly.
- _____ 19. Filing correspondence alphabetically by content.
- _____ 20. These folders contain correspondence to, from, or about an individual or company.
- _____ 21. Putting names in order according to the letters of the alphabet.
- _____ 22. A way of locating records not returned to the files promptly.
- _____ 23. An indented or raised line on the fold of a file folder.
- _____ 24. The technique of sorting records according to the captions under which they are filed.
- _____ 25. A continuous process of moving records from the active to the inactive files.

MATCHING 2

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- | | | |
|-----------------------|-------------------|-----------------|
| A. Perpetual transfer | F. Retention | L. Tab |
| B. Primary guides | G. Retrieval | M. Tickler file |
| C. Record | H. Score | N. Transfer |
| D. Records management | I. Sort | O. Ultrafiche |
| E. Release mark | J. Store | P. Unit |
| | K. Subject filing | Q. Videodisk |

- | | |
|--|---|
| _____ 1. The written, typed, or printed heading on tabs or guides. | _____ 8. Reducing documents to minute images in order to store them on microfilm. |
| _____ 2. The segment of a folder or guide that extends above the folder's edge and which holds the caption identifying its contents. | _____ 9. Locating records which are stored in the files. |
| _____ 3. Checking documents for initials or other indications that material is released for storage. | _____ 10. One or more related items of data stored as a unit. |
| _____ 4. Film, such as microfiche and microfilm, that contains reduced images of documents and is used for record storage. | _____ 11. Organizing and managing the creation, security, utilization, storage, and final distribution of business records. |
| _____ 5. The film medium upon which the smallest images of documents are stored. | _____ 12. Association of Record Managers and Administrators, Inc. |
| _____ 6. The system used to make storing records a reliable and systematic process. | _____ 13. The initials of the person who originally received the article of correspondence. |
| _____ 7. A check-out system used for removing materials from a file. | _____ 14. Stiff pieces of cardboard or other material that divide a file drawer into sections. |
| | _____ 15. The length of time a specific record is kept in the files. |

MATCHING 3

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- | | |
|-------------------------|----------------------|
| A. Nonessential records | C. Important records |
| B. Useful records | D. Vital records |

- _____ 1. May be destroyed after three or four years.
- _____ 2. Are destroyed after temporary use.
- _____ 3. Canceled checks.
- _____ 4. Corporate charter.
- _____ 5. Replaced at great cost if destroyed.
- _____ 6. Should be kept in a safe for protection from fire, theft, or other disasters.
- _____ 7. Only temporarily useful in the business.
- _____ 8. Helpful in operation of business for a limited time.
- _____ 9. Should be kept for six to seven years.
- _____ 10. Necessary to the operation of the business.
- _____ 11. Replaced at a small cost if destroyed.
- _____ 12. Records that assist in the operation of the business.
- _____ 13. Bulletin-board announcements.
- _____ 14. Irreplaceable records.
- _____ 15. Bank statements.

FILL IN THE BLANK

INSTRUCTIONS: Place the appropriate word or words in the blank provided.

- _____ 1. Written communication between a company and other businesses.
- _____ 2. The systematic process of classifying, arranging, and storing information so that it can be easily retrieved.
- _____ 3. A field or category within a record that is used to identify, select or sort records.
- _____ 4. The initials of the person who originally received the article of correspondence.
- _____ 5. Marking units in a filing segment.
- _____ 6. The container in which papers or materials are kept in a file.
- _____ 7. Filing records in a file according to the alphabet, subject, date, or number.
- _____ 8. Putting names in order according to the letters of the alphabet.
- _____ 9. Checking documents for initials or other indications that material is released for storage.
- _____ 10. Locating records which are stored in the files.
- _____ 11. Stiff pieces of cardboard or other material that divide a file drawer into sections.
- _____ 12. Data is arranged in sequence from lowest to highest or alphabetically from A to Z.
- _____ 13. Data is arranged in sequence from highest to lowest or alphabetically from Z to A.
- _____ 14. The written, typed, or printed heading on tabs or guides.
- _____ 15. Items used to determine correct filing sequence, not categories for filing purposes.
- _____ 16. Term used for all correspondence that originates outside the office.

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- _____ 17. Term used for all correspondence that originates inside the office.
- _____ 18. A file which is organized by the day of the month to serve as a daily memorandum of tasks.
- _____ 19. A standard form used to request in writing material that is in the files.

ESSAY

1. List in order and briefly explain the six steps in filing correspondence.

(1)

(2)

(3)

(4)

(5)

(6)

2. List and briefly explain the five steps of the record cycle.

(1)

(2)

(3)

(4)

(5)

ACTIVITY 1

INSTRUCTIONS: Place a letter from A to E in the blanks to the left of each item to indicate which item would be in the front of the file drawer (A) and which would be in the back of the file drawer (E).

- | | | | |
|------------|---|------------|--|
| I. _____ | 1. Interstate Shipping Co. | IV. _____ | 1. College of the South |
| _____ | 2. Inter State Trade | _____ | 2. Cole's School of Fashion |
| _____ | 3. International Farm
Equipment | _____ | 3. Commission on Interior
Design |
| _____ | 4. Inter National | _____ | 4. School of Woodworking &
Design |
| _____ | 5. Inter-Continental | _____ | 5. Agency of Finance |
| II. _____ | 1. Ted's Tunes
5 Elm Avenue
Columbus, GA 72572 | V. _____ | 1. Hidalgo County Police
Dept. |
| _____ | 2. Top Video
17 Main Street
Columbus, OH 23456 | _____ | 2. Hidalgo City Library |
| _____ | 3. Top Video, Inc.
36 Fair Lane
Columbia, MO 35241 | _____ | 3. Hidalgo City Board of
Education |
| _____ | 4. Ted's Tunes
1515 North Broadway
Columbia, GA 62441 | _____ | 4. Hidalgo County School
Board |
| _____ | 5. Top Video
2717 North Broadway
Columbia, GA 62441 | _____ | 5. Hidalgo City Dept. of
Recreation |
| III. _____ | 1. New York Clothiers | VI. _____ | 1. You-Tote-It Grocery |
| _____ | 2. New Mexico Fashion Mart | _____ | 2. 1 Park Place Pharmacy |
| _____ | 3. Newark Building Supplies | _____ | 3. 7-11 Drive Thru |
| _____ | 4. North Place Inn | _____ | 4. Seventh Tour Agency |
| _____ | 5. Nearly New Car Co. | _____ | 5. Your Turn Golf Course |
| | | VII. _____ | 1. U. S. Govt. Department of
Justice |
| | | _____ | 2. U. S. Govt. F. B. I. |
| | | _____ | 3. U. S. Govt. Department of
State |
| | | _____ | 4. U. S. Govt. Library of
Congress |
| | | _____ | 5. U. S. Govt. Civil Service
Commission |

ACTIVITY 2

INSTRUCTIONS: List on the line below the number of the items that should be cross-referenced.

1. Maureen Marie Allen (Mrs. David)
 2. Harris & Reed Inc.
 3. Jayne Ann McMillan (Mrs. Walter)
 4. Abraham Lincoln Elementary School
 5. Fairfield Savings and Loan (Formerly Fair Park Savings & Loan)
 6. Davis Publishers (Publishers of Video Weekly Magazine)
 7. Debbie's Custom Draperies, Inc.
 8. Hobb's Flower Shop
 9. Juan Rodriguez & Sons Inc.
 10. Jones and Jones Insurance Co.
-

ACTIVITY 3

INSTRUCTIONS: Give the second indexing unit for the following:

- | | | |
|-----|-------|-------------------------------------|
| 1. | _____ | Motel 6 |
| 2. | _____ | 10th Street Restaurant |
| 3. | _____ | XYZ Stationary Shop |
| 4. | _____ | Utilities Department of Dallas |
| 5. | _____ | KROT Radio Station |
| 6. | _____ | Dallas Morning News |
| 7. | _____ | Robert Travis Elementary School |
| 8. | _____ | Caldwell and Baker Realtors |
| 9. | _____ | San Francisco Electric Co. |
| 10. | _____ | Garcia-Garza Auto Supply |
| 11. | _____ | G. Maria Rodriquez |
| 12. | _____ | Princess Ann |
| 13. | _____ | Mary Waterby-Reed |
| 14. | _____ | Robert St. John |
| 15. | _____ | Mrs. J. J. Pickerton (Mary Louise) |
| 16. | _____ | Mrs. Virginia Mariot (Mrs. Richard) |
| 17. | _____ | Santos Cruz |
| 18. | _____ | Hilda De la Garza |
| 19. | _____ | Marilyn O'Reilly |
| 20. | _____ | U. S. Department of the Treasury |

ANSWERS

True/False

- | | | |
|------|-------|-------|
| 1. F | 10. F | 19. F |
| 2. F | 11. T | 20. T |
| 3. T | 12. F | 21. T |
| 4. T | 13. F | 22. F |
| 5. F | 14. T | 23. T |
| 6. F | 15. T | 24. F |
| 7. T | 16. T | 25. T |
| 8. F | 17. F | 26. T |
| 9. T | 18. F | 27. F |
| | | 28. T |

Multiple Choice

- | | | | |
|-------|-------|-------|-------|
| 1. D | 12. C | 23. D | 34. C |
| 2. D | 13. A | 24. D | 35. C |
| 3. A | 14. D | 25. B | 36. D |
| 4. D | 15. C | 26. D | 37. A |
| 5. D | 16. D | 27. A | 38. C |
| 6. C | 17. B | 28. C | 39. B |
| 7. A | 18. C | 29. C | 40. D |
| 8. D | 19. A | 30. B | 41. B |
| 9. B | 20. B | 31. D | 42. A |
| 10. C | 21. A | 32. C | 43. A |
| 11. B | 22. B | 33. A | 44. B |

- | | | | |
|-------|-------|-------|-------|
| 45. D | 51. C | 57. D | 64. C |
| 46. C | 52. D | 58. A | 65. B |
| 47. A | 53. A | 59. C | 66. C |
| 48. A | 54. C | 60. B | 67. B |
| 49. D | 55. B | 61. D | 68. C |
| 50. B | 56. B | 62. B | 69. B |
| | | 63. C | 70. B |

Matching 1

- | | | | | |
|------|-------|-------|-------|-------|
| 1. H | 6. N | 11. I | 16. F | 21. L |
| 2. J | 7. W | 12. K | 17. Y | 22. S |
| 3. U | 8. G | 13. X | 18. M | 23. A |
| 4. T | 9. Q | 14. R | 19. P | 24. V |
| 5. C | 10. Z | 15. D | 20. B | 25. E |

Matching 2

- | | | | | |
|------|------|------|-------|-------|
| 1. L | 4. H | 7. O | 10. P | 13. E |
| 2. O | 5. K | 8. G | 11. I | 14. B |
| 3. D | 6. A | 9. C | 12. M | 15. F |

Matching 3

- | | | | | |
|------|------|------|-------|-------|
| 1. B | 4. D | 7. A | 10. D | 13. A |
| 2. A | 5. C | 8. B | 11. B | 14. D |
| 3. D | 6. D | 9. C | 12. C | 15. B |

Fill in the Blank

- | | |
|-------------------|--------------------------|
| 1. Correspondence | 10. Retrievals |
| 2. Filing | 11. Guide |
| 3. Key unit | 12. Ascending |
| 4. Release marks | 13. Descending |
| 5. Coding | 14. Caption |
| 6. Folder | 15. Identifying elements |
| 7. Store | 16. Incoming |
| 8. Alphabetizing | 17. Outgoing |
| 9. Inspecting | 18. Ticker file |
| | 19. Requisition |

Essay

1. Evaluated to the satisfaction of the instructor.
2. Evaluated to the satisfaction of the instructor.

Activities

- | | | | |
|----|------------------|----|------------------|
| 1. | 1. D, B, E, C, A | 2. | 1, 2, 3, 4, 5, 6 |
| | 2. D, A, E, C, B | | |
| | 3. E, B, A, C, D | | |
| | 4. E, B, A, C, D | | |
| | 5. C, B, E, A, D | | |
| | 6. B, C, E, A, D | | |
| | 7. E, B, D, C, A | | |

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3. 1. Six
2. Street
3. Stationary
4. City
5. Radio
6. Morning
7. Travis
8. Baker
9. Electric
10. Garza

11. G
12. Ann
13. Mary
14. Robert
15. J
16. Virginia
17. Santos
18. Hilda
19. Marilyn
20. Government

TRUE AND FALSE

1. The yellow pages of a telephone directory are an example of geographic filing.
2. Subject filing is a direct access system because it must be controlled by an index.
3. Subject files are arranged alphabetically by geographic area, then by name or subject.
4. Public utilities companies, real estate firms, and government agencies are primary examples of users of subject filing.
5. Geographic filing is the most difficult system to use and set up.
6. Subject filing is considered to be a very specialized system of filing.
7. The purposes of a database are to add or delete data, search a file, update or change a file, sort and print.
8. Database management systems are the programs used to communicate with a database.
9. The American Records Management Association is one of the primary sources of filing rules.
10. The three structural types of a database management system are hierarchical, network, and relational.
11. A worker should use only the ARMA system and NOT the system established in his/her place of business.
12. The primary purpose of filing systems is to retrieve records quickly and efficiently.
13. Filing records by location is known as subject filing.
14. Filing correspondence alphabetically by content is known as geographic filing.
15. Filing by number rather than filing alphabetically is known as numeric filing.
16. Numeric filing is an indirect access system because an alphabetic index is needed to determine the number assigned to an individual file.
17. An accession record is used in numeric filing to list all previously assigned file numbers.
18. Retrieval is the removal of records from the files in order to obtain information.
19. An advantage of indirect-access systems is that duplication of records is avoided.
20. Duplication of records is not a problem of the direct-access system.

21. Terminal digit filing is put into groups first by the guide number, second by drawer number, and third by the folder name.
22. Middle digit filing is put into groups first by the folder number, second by the guide number, and third by the drawer number.
23. License plate registration is an example of alphanumeric filing system.
24. A department store directory is an example of a subject filing system.
25. Subject filing is an example of a direct access system.
26. Public utilities, real estate firms, and government agencies are some of the major users of geographic filings.
27. Marking units of correspondence with names or numbers is indexing.

MULTIPLE CHOICE

1. In electronic filing, databases were designed to:
A. Decrease repetitive work C. Increase efficiency
B. Increase repetitive work D. None of the above
2. A filing system that uses an ordered sequence of numerals is known as:
A. Terminal digit system C. Consecutive numeric system
B. Middle digit system D. Alternating digit system
3. A filing system using precisely designated numbers to classify records into groups with the final numbers showing where to start searching for file is known as:
A. Terminal digit system C. Alternating digit system
B. Middle digit system D. Consecutive numeric system
4. The _____ filing system is the most difficult to set up and use.
A. Geographic C. Numeric
B. Subject D. Alphabetic
5. Variations of subject-numeric filing include:
A. Simple-numeric C. Duplex-numeric
B. Decimal-numeric D. All of the above
6. A DBMS:
A. Allows you to work between two files simultaneously C. Both A and B
B. Uses multiple programs to provide software support D. None of the above
7. When data is stored in a "family tree" order the structure is:
A. Hierarchical C. Network
B. Logical D. Relational
8. The slowest type of DBMS structure is:
A. Network C. Logical
B. Relational D. Hierarchical
9. Which statement is TRUE in regard to updating files in a database?
A. You cannot update a database C. You can delete files
B. You can update files, but you cannot delete files D. You can delete files, but you cannot update files

10. Typical database management applications include:
- | | |
|-----------------|---------------------|
| A. Accounting | C. Sports |
| B. Construction | D. All of the above |
11. What is the correct hierarchy of data (lowest to highest)?
- | | |
|----------------------------------|----------------------------------|
| A. Database, record, field, file | C. File, database, record, field |
| B. Field, record, file, database | D. Field, database, record, file |
12. An advantage of a DBMS is:
- | | |
|--|--|
| A. Updating of a record need only be done once | C. Privacy can be compromised |
| B. Errors are perpetuated | D. Only one user can access a file at one time |

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided.

A.	Search	F.	Field	K.	DBMS
B.	Sort	G.	File	L.	Hierarchical
C.	Index	H.	Criteria	M.	Database
D.	Relational	I.	Select	N.	Query
E.	Appending	J.	Key	O.	Record

- _____ 1. Rules used for selecting records from a database.
- _____ 2. A collection of data relating to a subject, organized to make information accessible for a variety of needs.
- _____ 3. To encode data so that it is unreadable by unauthorized persons.
- _____ 4. A subdivision of a record; an item of data within a record.
- _____ 5. A set of related records stored together.
- _____ 6. A value which points to or counts records in a file or list.
- _____ 7. A field or category within a record that is used to identify, select, or sort records.
- _____ 8. A high-level, English-like language used with database to make requests.
- _____ 9. One or more related items of data stored as a unit.
- _____ 10. A database made up of files that consist of records and files.
- _____ 11. To look for all records that meet a set criteria.
- _____ 12. To choose records from a file according to rules or criteria.
- _____ 13. To arrange records according to a predetermined sequence.
- _____ 14. A class of data such as a name, date, cost, or part number (a field).
- _____ 15. A term for adding records to an existing database file.

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. System of filing correspondence alphabetically by content.
- _____ 2. System of filing records by geographic location.
- _____ 3. A filing system using precisely designated numbers to classify into groups; the final number shows where to start searching for the file.
- _____ 4. Term used for data items which may contain digits, letters, or special characters.
- _____ 5. Adding records to an existing database file.
- _____ 6. The rules used for selecting records from the database.
- _____ 7. A subdivision of a record.
- _____ 8. Allow complex retrievals to be made through logical operators AND, OR, and NOT.
- _____ 9. A symbol or word to inform the user that a response is needed.
- _____ 10. A database made up of files that consist of records and fields.
- _____ 11. To choose records from a file according to rules or criteria.
- _____ 12. Data items which may contain digits, letters, or special characters.
- _____ 13. This logic system uses such operators as AND, OR, and NOT for searching and sorting records.
- _____ 14. The automatic value of an option if the user does not specify a choice.
- _____ 15. A database structure organized in the form of a tree in top-down order.
- _____ 16. Arranged in order from lowest to highest (or alphabetically from A to Z).

- _____ 17. To drop or cut off characters in a field to make it a certain length.
- _____ 18. A class of data such as a name, date, cost, or part number (a field).
- _____ 19. Arranged in order from highest to lowest (or alphabetically from Z to A).
- _____ 20. A database structure organized in the form of a network, providing access at multiple levels.
- _____ 21. To look for all records that meet a set of criteria.
- _____ 22. The most sophisticated type of database program which should be distinguished from a file manager or filing program.
- _____ 23. A common form of database program, more powerful than a true database management system.
- _____ 24. A high-level, English-like language used with a database to make requests.
- _____ 25. A descriptive characteristic of hardware, such as the type of monitor.
- _____ 26. To arrange records according to a predetermined sequence.
- _____ 27. To remove a record from a file.
- _____ 28. Establishing the records and fields to be used in a database.
- _____ 29. A field or category within a record that is used to identify, select, or sort records.
- _____ 30. A collection of data relating to a subject, organized to make information accessible for a variety of needs.
- _____ 31. A map of the logical structure of a database.
- _____ 32. To encode data so that it is unreadable by unauthorized persons.
- _____ 33. A value which points to or counts records in a file or list.
- _____ 34. One or more related items of data stored as a unit.

- _____ 35. A set of related records stored together.
- _____ 36. An operator, such as AND or OR, that is used to relate logical expressions.

ESSAY

1. List and briefly explain five capabilities of a database management software.

(1)

(2)

(3)

(4)

(5)

ACTIVITY 1

INSTRUCTIONS: Number the proper sequence according to the terminal digit filing.

- | | | | | | | | |
|----|-------|----|----------|-----|-------|-----|------------|
| I. | _____ | 1. | 23-43-17 | II. | _____ | 1. | 21-102-876 |
| | _____ | 2. | 23-52-08 | | _____ | 2. | 22-007-725 |
| | _____ | 3. | 24-11-13 | | _____ | 3. | 16-429-681 |
| | _____ | 4. | 25-08-11 | | _____ | 4. | 29-118-816 |
| | _____ | 5. | 26-55-05 | | _____ | 5. | 21-349-222 |
| | _____ | 6. | 26-55-05 | | _____ | 6. | 17-033-220 |
| | | | | | _____ | 7. | 15-624-873 |
| | | | | | _____ | 8. | 28-539-292 |
| | | | | | _____ | 9. | 18-320-324 |
| | | | | | _____ | 10. | 16-438-885 |

ACTIVITY 2

INSTRUCTIONS: Number the proper sequence according to middle digit filing.

- | | | | | | | | |
|----|-------|----|----------|-----|-------|----|------------|
| I. | _____ | 1. | 17-15-21 | II. | _____ | 1. | 286-17-475 |
| | _____ | 2. | 18-25-68 | | _____ | 2. | 296-75-159 |
| | _____ | 3. | 26-34-05 | | _____ | 3. | 296-75-170 |
| | _____ | 4. | 26-34-44 | | _____ | 4. | 296-78-495 |
| | _____ | 5. | 75-05-22 | | _____ | 5. | 300-14-099 |
| | _____ | 6. | 92-18-01 | | _____ | 6. | 301-08-320 |

ACTIVITY 3

INSTRUCTIONS: Number the proper sequence according to consecutive numeric order.

- | | | | | | |
|-------|----|-------|-------|-----|-------|
| _____ | 1. | 54573 | _____ | 6. | 54773 |
| _____ | 2. | 54491 | _____ | 7. | 54442 |
| _____ | 3. | 54465 | _____ | 8. | 54496 |
| _____ | 4. | 54402 | _____ | 9. | 54763 |
| _____ | 5. | 54201 | _____ | 10. | 54225 |

ACTIVITY 4

INSTRUCTIONS: Number the proper sequence according to geographic filing.

- I. _____ 1. Ralph's, Pleasantville, Kansas
_____ 2. Ralph's, Pleasantville, Arkansas
_____ 3. Ralph's, Pleasantville, Florida
_____ 4. Ralph's, Pleasant Grove, Texas
_____ 5. Ralph's, Pleasant Grove, Georgia
- II. _____ 1. Mary's, Ames, Iowa
_____ 2. Mary's, Dover, Delaware
_____ 3. Mary's, Ogden, Utah
_____ 4. Pete's Place, Topeka, Kansas
_____ 5. Pete's Place, Salem, Oregon
- III. _____ 1. M. I. T., Boston, MA
_____ 2. U. S. C., Los Angeles, CA
_____ 3. Austin Elementary School, Edinburg, TX
_____ 4. Lincoln Jr. High School, McAllen, TX
_____ 5. Lamar Jr. High School, McAllen, TX
- IV. _____ 1. Mary Bradley, Reno, NV
_____ 2. Sue Ellen Johnstone, Albany, NY
_____ 3. Mary Ann Ellsworth, Albany, GA
_____ 4. Alfred Williams, Brownwood, LA
_____ 5. Wilbert Smith, Newark, NJ
- V. _____ 1. Mary Elizabeth White, Louisville, KY
_____ 2. Betty Sue Gull, Smithville, NC
_____ 3. John Mark Savage, Corpus Christi, TX
_____ 4. Amy Irene Jones, Monroe, LA
_____ 5. Zelda Hefner, Augusta, NE

ACTIVITY 5

Part 1

INSTRUCTIONS: The following courses are some subjects available in a high school curriculum. Using the dictionary method of subject filing, indicate the correct dictionary order by placing a letter from A to S in the blanks to the left of each number.

- | | | | |
|-----------|-----------------------------|-----------|----------------|
| 1. _____ | Typewriting | 11. _____ | Biology |
| 2. _____ | Accounting | 12. _____ | English |
| 3. _____ | Geometry | 13. _____ | Algebra |
| 4. _____ | World History | 14. _____ | Recordkeeping |
| 5. _____ | Chemistry | 15. _____ | Art |
| 6. _____ | Physical Science | 16. _____ | Shorthand |
| 7. _____ | Building Trades | 17. _____ | Auto Mechanics |
| 8. _____ | Masonry | 18. _____ | Geography |
| 9. _____ | Marketing
Education | 19. _____ | Vocal Music |
| 10. _____ | Correlated
Language Arts | | |

Part 2

INSTRUCTIONS: Using the Encyclopedia method, categorize the following subjects in Activity 5. (List the letters.)

<u>Business</u> _____	<u>Math</u> _____
<u>Fine Arts</u> _____	<u>Social Studies</u> _____
<u>Science</u> _____	<u>Vocational</u> _____
<u>English/Language Arts</u> _____	

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. F | 10. T | 19. T |
| 2. F | 11. F | 20. F |
| 3. F | 12. T | 21. F |
| 4. F | 13. F | 22. F |
| 5. F | 14. F | 23. T |
| 6. F | 15. T | 24. T |
| 7. T | 16. T | 25. F |
| 8. T | 17. T | 26. T |
| 9. T | 18. T | 27. F |

Multiple Choice

- | | | |
|------|------|-------|
| 1. C | 5. D | 9. C |
| 2. C | 6. C | 10. D |
| 3. A | 7. A | 11. B |
| 4. B | 8. B | 12. A |

Matching

- | | | |
|------|-------|-------|
| 1. H | 6. C | 11. A |
| 2. M | 7. J | 12. I |
| 3. P | 8. N | 13. B |
| 4. F | 9. O | 14. Q |
| 5. G | 10. D | 15. R |

Fill in the Blank

- | | |
|----------------------------|------------------------|
| 1. Subject | 19. Decending sequence |
| 2. Geographic | 20. Plex structure |
| 3. Terminal digit | 21. Search (Find) |
| 4. Alphanumeric | 22. DBMS |
| 5. Appending | 23. File manager |
| 6. Criteria | 24. Query language |
| 7. Field | 25. Attribute |
| 8. Logical expressions | 26. Sort |
| 9. Prompt | 27. Delete |
| 10. Relational | 28. Create |
| 11. Select | 29. Key |
| 12. Alphanumeric | 30. Database |
| 13. Boolean logic | 31. Schema |
| 14. Default | 32. Encrypt |
| 15. Hierarchical structure | 33. Index |
| 16. Ascending sequence | 34. Record |
| 17. Truncate | 35. File |
| 18. Category | 36. Logical operator |

Essay

1. Evaluated to the satisfaction of the instructor.

Activities

1. I. 6, 2, 4, 3, 1, 5
II. 6, 5, 8, 9, 3, 2, 4, 7, 1, 10

2. I. 5, 1, 6, 2, 3, 4
II. 6, 5, 1, 2, 3, 4

3.

1.	5
2.	10
3.	4
4.	7
5.	3

6.	2
7.	8
8.	1
9.	9
10.	6

4. I. 2, 3, 5, 1, 4
II. 2, 1, 4, 5, 3
III. 2, 1, 3, 5, 4
IV. 3, 4, 1, 5, 2
V. 1, 4, 5, 2, 3

5. **Part 1**

- | | |
|-------|-------|
| 1. B | 11. C |
| 2. M | 12. I |
| 3. J | 13. H |
| 4. Q | 14. F |
| 5. K | 15. N |
| 6. G | 16. P |
| 7. E | 17. A |
| 8. O | 18. D |
| 9. L | 19. S |
| 10. R | |

Part 2

Business: B, O, Q, A

Social Studies: R, D

Fine Arts: J, S

Vocational: Q, G, I, H

Science: K, E, F

English/Language Arts: L, O

Math: M, C

COMPETENCY MATRIX OF TEST BANK QUESTIONS

SECTION IV

SECTION IV		QUESTION TYPES				
Unit	Comp.	T/F	MC	Match	Fill-in	Essay
1	1	14,15,17,21,26	11,12,19,20	see below	1,2,10	1,2
	2	12,13,16,18,27 28	2,3,5,7-20	see below	4-7,9,11, 14-19	
	3	23	1,11	see below	3,12,13	
	4	1-11,19,20,22 24,25	4,6,21-70	see below	8	
		Match 1	Match 2	Match 3		
	1			1-15		
	2	1,5,7-9,12,23,25	3-5,7,8,13,14			
	3					
	4	2-4,6,10,11 13-22,24	1,2,6,9-12,15			
2&3	1	2-4,6,9,11-13 15-25	2-8,11		3,4,12	
	2	1,5,9,11,14-23 26,27	2,3,5,7,8,11		2-4,12	
	3	1-8,10,13,14 24-26	1,4,9,10,12	1-15	1,2,5-11, 13-36	

TRUE AND FALSE

1. There are various steps involved in processing mail.
2. The first step involved in processing mail is opening the mail.
3. You should always open mail items marked Personal or Confidential to ensure a prompt response.
4. It is necessary to record any special mail in the mail register.
5. Read and annotate personal correspondence to be helpful to your employer.
6. Advertising mail should be opened and organized into stacks based on who will receive the mail.
7. Newspapers and periodicals should be unwrapped and flattened.
8. All packages should be opened and should have their contents checked against the packing slip.
9. Routine mail includes bills, reports, certified letters, and advertisements.
10. When processing outgoing mail, you should always inspect the mail for a signature. If there is none, you should sign it.
11. Special notations, such as Special Delivery, should be noted on the outside of the envelope.
12. Interoffice mail is routed within the company.
13. The inside address should agree with the address on the envelope.
14. Folding and inserting mail is a very important step in handling incoming mail.
15. Window envelopes are used to eliminate the need to retype the address.
16. Business envelopes come in two sizes: 6 1/2" x 3 5/8" and 9 1/2" x 4 1/8".
17. Metered mail is the most inefficient means of stamping mail.
18. Automated mail equipment is used in all post offices to speed mail to its destination.
19. ZIP Codes speed up the processing of mail.
20. The first digit in a standard five digit ZIP Code represents the city.
21. The last two digits in a standard five digit ZIP Code represent the local post office of destination.
22. Facing mail is arranging envelopes so the addresses all face forward.

23. A post card is considered second-class mail.
24. Certified mail is a special postal-service offered by the United States Postal Service.
25. Courier and messenger services ensure delivery by a specific time.
26. To reduce the possibility of cutting contents when opening mail, tap the lower edge of the envelope so that the contents will drop to the bottom of the envelope.
27. If you open a letter by mistake, distribute the envelope to the correct person and do not mention the mistake.
28. Expensive items sent through the mail may be insured for amounts up to \$4,000.
29. ZIP Codes do not speed up the processing of mail.
30. Personal mail is a personal delivery service that can guarantee overnight delivery of documents with the U.S.
31. Parcel-post packages may be opened by the postal service for inspection.
32. International mail is all mail that circulates within the United States.
33. Certified mail provides the sender with a mailing receipt and a record of delivery at the addressee's post office.
34. Money orders are not safe for sending money through the mail.
35. Mail may be folded in any manner just as long as it fits in the envelope.

MULTIPLE CHOICE

1. The first step involved in processing mail is to:
A. Classify the mail
B. Open the mail
C. Gather necessary supplies
D. Record special mail in the mail register
2. In a small office, the _____ is usually responsible for the mail.
A. Mail department
B. Accountant
C. Executive officer
D. Secretary
3. A number 6 envelope measures:
A. $6 \frac{5}{8}'' \times 3 \frac{1}{2}''$
B. $6 \frac{1}{2}'' \times 3 \frac{5}{8}''$
C. $6 \frac{3}{8}'' \times 3 \frac{1}{2}''$
D. $6 \frac{2}{5}'' \times 3 \frac{5}{8}''$
4. A standard sheet of paper measures:
A. $8'' \times 11 \frac{1}{2}''$
B. $8 \frac{1}{2}'' \times 11''$
C. $11'' \times 8 \frac{1}{2}''$
D. $11 \frac{1}{2}'' \times 8''$
5. Bills, reports, advertisements, and newspapers are all examples of what type of mail?
A. Routine mail
B. Urgent mail
C. ASAP mail
D. Personal mail
6. First-class mail, confidential mail, and memorandums are examples of what type of mail?
A. Routine mail
B. Urgent mail
C. ASAP mail
D. Personal mail
7. Airmail and certified mail are examples of what type of mail?
A. Routine mail
B. Urgent mail
C. ASAP mail
D. Personal mail
8. Outgoing correspondence should be inspected for all the following EXCEPT:
A. Routing slip
B. Signature
C. Enclosures
D. Special notations
9. The first digit in a standard five digit ZIP Code represents:
A. Sectional center
B. Local post office
C. Street number
D. Geographic location

10. The second and third digits in a standard five digit ZIP Code represents:
- | | |
|----------------------|------------------------|
| A. Sectional center | C. Street number |
| B. Local post office | D. Geographic location |
11. The last two digits in a standard five digit ZIP Code represents:
- | | |
|----------------------|------------------------|
| A. Sectional center | C. Street number |
| B. Local post office | D. Geographic location |
12. In an expanded nine-digit ZIP Code, the first two digits after the hyphen represents a:
- | | |
|---------------------------|-------------------|
| A. Certain sector of city | C. Certain street |
| B. Certain post office | D. Certain state |
13. In an expanded nine-digit ZIP Code, the last two digits represent a:
- | | |
|---------------------------|-------------------|
| A. Certain sector of city | C. Certain street |
| B. Certain post office | D. Certain state |
14. A letter belongs to what class of mail?
- | | |
|-----------------|-----------------|
| A. First-class | C. Third-class |
| B. Second-class | D. Fourth-class |
15. A catalog belongs to what class of mail?
- | | |
|-----------------|-----------------|
| A. First-class | C. Third-class |
| B. Second-class | D. Fourth-class |
16. A post card belongs to what class of mail?
- | | |
|-----------------|-----------------|
| A. First-class | C. Third-class |
| B. Second-class | D. Fourth-class |
17. First-class zone-rated mail weighs:
- | | |
|-------------------|-------------------|
| A. 12 ounces | C. 16 ounces |
| B. over 12 ounces | D. Over 16 ounces |
18. Second-class mail includes all of the following EXCEPT:
- | | |
|----------------|----------------|
| A. Newspapers | C. Magazines |
| B. Periodicals | D. Merchandise |
19. Mail that goes outside the United States is:
- | | |
|-----------------------|-------------------|
| A. Registered mail | C. Domestic mail |
| B. International mail | D. Certified mail |

OSS/Testbank/Section V
Unit 1: Incoming and Outgoing Mail

20. First-class mail weighing over 12 ounces is referred to as:
- | | |
|-------------------|------------------|
| A. Certified mail | C. Priority mail |
| B. Domestic mail | D. Insured mail |
21. First-class mail that provides receipts for the sender is:
- | | |
|-------------------|------------------|
| A. Certified mail | C. Priority mail |
| B. Domestic mail | D. Insured mail |
22. Mail sent and delivered within the United States is:
- | | |
|-------------------|------------------|
| A. Certified mail | C. Priority mail |
| B. Domestic mail | D. Insured mail |
23. The mail clerk should check letters for all the following things, EXCEPT:
- | | |
|---------------------|-----------------------|
| A. Date | C. Sender's signature |
| B. Sender's address | D. Sender's initials |
24. _____ is a message sent by Western Union to the local post office and delivered with the regular mail.
- | | |
|------------------|--------------------------|
| A. Domestic mail | C. Special delivery mail |
| B. Mailgram | D. Traced mail |
25. _____ provides protection for sending valuable items through the mail.
- | | |
|------------------|--------------------|
| A. Insured mail | C. Registered mail |
| B. Recalled mail | D. Traced mail |
26. _____ is the best way to send money through the mail.
- | | |
|----------------------|--------------------|
| A. Money order | C. Registered mail |
| B. Messenger service | D. Traced mail |
27. _____ service ensures delivery by a specified time.
- | | |
|---------------------------|------------------------------|
| A. Certified and domestic | C. Personal and confidential |
| B. Courier and messenger | D. Registered and special |
28. _____ is a proof of delivery and is available on insured mail of more than \$15 value and on certified and registered mail.
- | | |
|-------------------|------------------------|
| A. Certified mail | C. Registered mail |
| B. Insured mail | D. Return receipt mail |
29. _____ is a postal service offered by the United States Postal Service that includes next day, custom-designed, and same-day airport service.
- | | |
|-----------------|--------------------------|
| A. Express mail | C. Registered mail |
| B. Insured mail | D. Special delivery mail |

30. _____ is delivered by a messenger as soon as it is received at the post office of the addressee.
- | | |
|-----------------|--------------------------|
| A. Express mail | C. Registered mail |
| B. Insured mail | D. Special delivery mail |
31. _____ provides insurance protection of merchandise for more than \$200 and a receipt for the sender.
- | | |
|-----------------|--------------------------|
| A. Express mail | C. Registered mail |
| B. Insured mail | D. Special delivery mail |
32. COD stands for:
- | | |
|-------------------------|----------------------|
| A. Collect-on-delivery | C. Cash-on delivery |
| B. Collect-on-departure | D. Check-on-delivery |

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- | | | |
|------------------------------|-----------------------|---------------------|
| A. Annotate | H. Insured Mail | Q. Registered Mail |
| B. Certificate of Mailing | I. International Mail | R. Return Receipt |
| C. Certified Mail | J. Interoffice Mail | S. Rough-Sorting |
| D. Confidential Mail | K. Mail Register | T. Routing Slip |
| E. Courier/Messenger Service | L. Mailgram | U. Second-class |
| F. Domestic Mail | M. Personal Mail | V. Special Delivery |
| G. Facing Mail | N. Postage Meter | W. Special Handling |
| | O. Priority Mail | X. Third-class |
| | P. Recalling Mail | Y. Tracing Mail |
| | | Z. ZIP Code |

- | | |
|---|---|
| _____ 1. Proof of delivery. | _____ 10. Mail exchanged between people who work at the same location or at the company's nearby branch. |
| _____ 2. Mail sent and delivered with the United States. | |
| _____ 3. First-class mail weighing over 12 ounces. | _____ 11. Machine which prints postage fees on gummed strips of paper that are used as stamps. |
| _____ 4. Confidential mail which is intended only for a specific individual. | _____ 12. Personal delivery service that can guarantee overnight delivery of documents and packages within the United States. |
| _____ 5. To provide explanatory marks in the margins of correspondence in order to assist the employers. | _____ 13. Special mail services for first-class mail which provides receipts for the sender proving that the item was mailed and delivered. |
| _____ 6. Personal mail that is intended for a specific individual. | _____ 14. The postal service will try to have a piece of mail returned to the sender if it has not already been delivered. |
| _____ 7. Code used by the postal service to speed up the processing of mail. | _____ 15. Mail service in which the postal service will reimburse the sender for the value of merchandise or for amount insured if the item is lost or damaged. |
| _____ 8. Sorting the mail according to local and out-of-town destinations. | |
| _____ 9. Certificate that is completed by the postal service at the time of mailing to prove that an item was mailed. | |

OSS/Testbank/Section V
Unit 1: Incoming and Outgoing Mail

- _____ 16. Mail services which provides any class of mail with the same prompt delivery time as first-class mail.
- _____ 17. A sheet of paper attached to a mail item which lists the names of the persons to whom the item will be distributed.
- _____ 18. Mail that goes outside the United States.
- _____ 19. Postal service will try to locate mail which has not been delivered within a reasonable time.
- _____ 20. Arranging the envelopes so that all of the addresses face forward and read from left to right.
- _____ 21. Recordkeeping form used to record the receipt of special incoming mail and expected items.
- _____ 22. Mail items which weigh less than 16 ounces and are not included in first- or second-class mail.
- _____ 23. Provides protection for sending valuable or important first-class or priority items.
- _____ 24. Message sent by Western Union to the local post office and delivered with the regular mail.
- _____ 25. Less expensive service than special delivery which provides faster handling for third- and fourth-class mail.
- _____ 26. Class of mail available only to publishers and registered news agents for sending out newspapers, periodicals, magazines, etc.
- _____ 27. Class of mail that includes advertisements, merchandise, books, and catalogs.
- _____ 28. Code that makes it possible for the mail to be sorted by machine.
- _____ 29. A machine licensed by the U.S. Postal Service.
- _____ 30. Process performed by secretary that saves time for the employer.

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. Never open mail items marked _____.
- _____ 2. _____ are those mail items expected by a specific date.
- _____ 3. Route mail by using _____ and photocopies to increase efficiency in distributing the mail.
- _____ 4. _____ mail is routed within the company.
- _____ 5. _____ envelopes are used to eliminate the need to retype the address.
- _____ 6. _____ is the most efficient means of stamping mail.
- _____ 7. _____ speed up the processing of mail.
- _____ 8. If the ZIP Code is not known, it can be looked up in the _____.
- _____ 9. _____ is sorting the mail according to local and out-of-town destinations.
- _____ 10. _____ is arranging the envelope so that all of the addresses face forward and read from left to right.
- _____ 11. Third-class mail is sometimes known as _____.
- _____ 12. Fourth-class mail is sometimes known as _____.
- _____ 13. _____ provides insurance protection of merchandise for more than \$200 and a receipt for the sender.
- _____ 14. _____ provides the sender with a mailing receipt and record of delivery at the addressee's post office.
- _____ 15. _____ covers printed matter or merchandise that is sent third-class, fourth-class, or air parcel-post.
- _____ 16. _____ ensures that the items are paid for when they are delivered.
- _____ 17. A _____ is a recordkeeping form used to record the receipt of special incoming mail.
- _____ 18. _____ should be processed in a timely organized manner.

_____ 19. _____ includes items requiring immediate attention.

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-

ANSWERS

True and False

- | | | | | |
|------|-------|-------|-------|-------|
| 1. T | 8. F | 15. T | 22. T | 29. F |
| 2. F | 9. F | 16. T | 23. F | 30. F |
| 3. F | 10. F | 17. F | 24. T | 31. T |
| 4. T | 11. T | 18. F | 25. T | 32. F |
| 5. F | 12. T | 19. T | 26. T | 33. T |
| 6. T | 13. T | 20. F | 27. T | 34. F |
| 7. T | 14. F | 21. T | 28. T | 35. F |

Multiple Choice

- | | | | |
|------|-------|-------|-------|
| 1. C | 9. D | 17. B | 25. C |
| 2. D | 10. A | 18. D | 26. A |
| 3. B | 11. B | 19. B | 27. B |
| 4. B | 12. A | 20. C | 28. D |
| 5. A | 13. B | 21. A | 29. A |
| 6. C | 14. A | 22. B | 30. D |
| 7. B | 15. C | 23. D | 31. C |
| 8. A | 16. A | 24. B | 32. A |

Matching

- | | | | | |
|------|-------|-------|-------|-------|
| 1. R | 7. Z | 13. C | 19. Y | 25. W |
| 2. F | 8. S | 14. P | 20. G | 26. U |
| 3. O | 9. B | 15. H | 21. K | 27. X |
| 4. M | 10. J | 16. V | 22. X | 28. Z |
| 5. A | 11. N | 17. T | 23. Q | 29. N |
| 6. D | 12. E | 18. I | 24. L | 30. A |

Fill in the blank

- | | |
|--------------------------------|---------------------|
| 1. Personal or confidential | 11. Junk mail |
| 2. Expected mail | 12. Parcel post |
| 3. Routing slips | 13. Registered mail |
| 4. Interoffice | 14. Certified mail |
| 5. Window | 15. Insured mail |
| 6. Metered mail | 16. COD Mail |
| 7. ZIP Codes | 17. Mail register |
| 8. National ZIP Code Directory | 18. Incoming mail |
| 9. Rough sorting | 19. Urgent Mail |
| 10. Racing mail | |

Essay

1. Use insured mail and insure the package for \$300 and record it in a mail register and send it third-class with a return receipt.
2.
 - a. Inspect the mail for signature.
 - b. Enclosures should be included either behind or in front of the letter. If the enclosure is missing, bring it to the attention of the person or department sending the letter.
 - c. Inside address should agree with the address on the envelope.
 - d. Special notations should be noted on the outside of the envelope.

TRUE AND FALSE

1. Anyone can gain access to bulletin board systems.
2. Samuel Morse developed the telegram in 1835.
3. E-mail can be accessed from any terminal.
4. E-mail cannot store messages and then recall them.
5. E-mail cuts communication time from days to minutes.
6. Digital code can be read by a computer.
7. Mailgrams are delivered with regular mail.
8. Bulletin board systems are not a form of electronic mail.
9. Job search resources are never found on bulletin board systems.
10. Facsimile images can be sent and received using modems.
11. A computer printer cannot be hooked up to a facsimile machine.
12. A printer is a major component of a fax machine.
13. The fax machine actually sends images over telephone lines.
14. Only large businesses make use of the facsimile machines.
15. The E-mail system allows you to read a message as soon as you are on-line.
16. The Group IV facsimile machine uses digitized information.
17. A facsimile machine scans a page in columns.
18. By 1990 facsimile machines will be standard desktop companions.
19. The Group I facsimile machine was introduced in the 1970s.
20. Telex is operated by the Western Union Telephone Company.

MULTIPLE CHOICE

1. Which of the following is NOT considered when selecting the appropriate form of E-mail?
 - A. Length of message
 - B. Volume of usage
 - C. Nature of message
 - D. Speed of transmission
2. E-mail:
 - A. Cuts communication time
 - B. Stores messages and easily recalls them
 - C. Stores messages and forwards them to another location
 - D. All of the above
3. Samuel Morse invented the:
 - A. Bulletin board
 - B. Telegraph
 - C. Facsimile machine
 - D. None of the above
4. An electronic message system service for special interest groups is called a:
 - A. Bulletin board
 - B. Telegraph
 - C. Facsimile machine
 - D. None of the above
5. All of the following can be found on a typical bulletin board system except:
 - A. Technical help
 - B. Software updates
 - C. Games
 - D. Recipes
6. Which of the following statements is false regarding facsimile transmission?
 - A. Images are stored digitally in the computer's memory
 - B. Images are printed automatically in color
 - C. Images can be sent and received using modems
 - D. Images are sent by means of radio waves or telephone lines
7. The major component of a fax machine that converts an image into an audio signal is the:
 - A. Printer
 - B. Phone
 - C. Scanner
 - D. Copier
8. The component of a fax machine that actually sends the image is the:
 - A. Printer
 - B. Phone
 - C. Scanner
 - D. Copier

9. The following are telephone features of a facsimile machine EXCEPT:
- | | |
|---------------------------------|-----------------|
| A. Speed and memory dialing | C. Broadcasting |
| B. Delayed and automatic redial | D. Call waiting |
10. Which of the following statements is true regarding the four classifications of facsimile machines?
- | | |
|--|---|
| A. Group I is the oldest and transmits information very fast | C. Group III was introduced by the Chinese |
| B. Group II was introduced in the 1960s | D. Group IV is the newest and fastest machine |

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- A. Bulletin Board
- B. Communications Software
- C. Data Communications
- D. Electronic Mail
- E. Facsimile Machine
- F. Local Area Network

- G. Microwave
- H. Modem
- I. Passwords
- J. Satellite
- K. Telecommunications
- L. User Groups
- M. Voice Mail

- | | | | |
|----------|--|-----------|--|
| _____ 1. | Device that electronically scans a printed page and converts the images into analog signals sent to another facsimile machine. | _____ 8. | A receiving machine that reverses the conversion process and prints the images on blank paper. |
| _____ 2. | A link between telephones and voice-activated computers. | _____ 9. | Exchange of data between computers. |
| _____ 3. | Transmission and receiving device that orbits the earth and permits communication over very long distances. | _____ 10. | A device that converts digital signals to analog signals, and analog back to digital so that computers can communicate over telephone lines. |
| _____ 4. | Communication requiring the use of telephone or telegraph lines or satellite networks. | _____ 11. | System that requires a network of cables and devices connecting company's computers so that they can all communicate with one another. |
| _____ 5. | An electronic message system for common or special interest groups. | _____ 12. | Transmission and storage of messages from the sender to the receiver. |
| _____ 6. | Short, electromagnetic wave that travels in a straight line throughout the air, carrying data and voices between disk-shaped antennas. | _____ 13. | A way to protect the security of computer data. |
| _____ 7. | Organizations of computer users that run many of the available bulletin boards. | _____ 14. | Programs that perform several software specialized functions so that one terminal can communicate with another. |

- _____ 15. E-mail.
- _____ 16. Allows an original document to be reproduced at remote locations.
- _____ 17. A place where electronic messages are posted.
- _____ 18. Cuts communication time from days to minutes.
- _____ 19. Consists of a computer and disk drive where messages or files are stored.
- _____ 20. A printer, scanner, phone, and copier combined into one machine.

FILL IN THE BLANK

- _____ 1. A _____ is probably the oldest type of electronic mail.
- _____ 2. A _____ is a message that is transmitted to a local post office from Western Union.
- _____ 3. Bulletin board systems are also referred to as _____.
- _____ 4. A _____ machine is actually a printer, scanner, phone, and copier combined into one machine.
- _____ 5. The major component of a _____ machine is a scanner.
- _____ 6. The _____ uses teleprinters and hardcopy output.
- _____ 7. The _____ uses telephones and voice communication output.
- _____ 8. _____ is valuable to travelers who access their mail from any terminal.
- _____ 9. With the E-mail system, each user has a _____.
- _____ 10. The _____ facsimile machine was introduced by the Japanese.

ESSAY

1. Describe the difference between Telex/TWX and conventional telephone network.
2. List the factors that are considered when selecting the appropriate form of E-mail.

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. F | 8. F | 15. T |
| 2. T | 9. F | 16. F |
| 3. T | 10. T | 17. F |
| 4. F | 11. F | 18. T |
| 5. T | 12. F | 19. F |
| 6. T | 13. T | 20. T |
| 7. T | 14. F | |

Multiple Choice

- | | | |
|------|------|-------|
| 1. C | 5. D | 8. B |
| 2. D | 6. B | 9. D |
| 3. B | 7. C | 10. D |
| 4. A | | |

Matching

- | | | |
|------|-------|-------|
| 1. E | 8. E | 15. D |
| 2. M | 9. C | 16. E |
| 3. J | 10. H | 17. A |
| 4. K | 11. F | 18. D |
| 5. A | 12. D | 19. A |
| 6. G | 13. I | 20. E |
| 7. L | 14. B | |

Fill in the blanks

- | | | |
|-------------|--------------------------------------|---------------|
| 1. Telegram | 5. Fax | 8. E-mail |
| 2. Mailgram | 6. Telex/TWX | 9. Mailbox |
| 3. BBS | 7. Conventional
telephone network | 10. Group III |
| 4. Fax | | |

Essay

1. They are similar but the Telex/TWX uses teleprinters and hardcopy output instead of telephones and voice communication.
2.
 - a. length of the message
 - b. volume of usage
 - c. speed of transmission
 - d. form of response needed

COMPETENCY MATRIX OF TEST BANK QUESTIONS

SECTION V

SECTION V		QUESTION TYPES				
Unit	Comp.	T/F	MC	Match	Fill-in	Essay
1	1		17,18	1		
	2	1-9,19,26,27,35	2,3	5,6,20,30	1-4,10,17-20	
	3	10-21,28	1,4,8-13,23	4,7,8,11,17,20 28,29	5-9	1,2
	4		5-7,14-18,24,25	2,3,10,18,20,22 26,27	11,12	1
	5		19-22,26-32	1,9,12-16,19 23-25	13-16	
2	1			9-15		
	2	2-5,7,15,20	1-3	2-4,6,12,18,19	1,2,6-9	1,2
	3	1,8,9	4,5	4,5,7,17	3	
	4	6,10-14,16-19	6-10	1,4,8,16,20	4,5,10	

TRUE AND FALSE

1. CR recorded on the tape of a calculator stands for credit balance.
2. The electronic display calculator is one type of an electronic calculator.
3. The calculator should always be placed on the persons right.
4. For the right-handed person, one of the advantages of using the touch system is that it allows for increased speed and accuracy.
5. For the right-handed person, the little finger is used to strike the optional keys to the right of the numeric keyboard on an electronic calculator.
6. The account number is needed when making a deposit on either a personalized deposit slip or on a general deposit slip.
7. You may erase a mistake on a check.
8. When you void a check, just throw it away.
9. An endorsement is the signature on the back of a check that allows it to be negotiated.
10. The check stub is the part of the check kept by the person writing the check.
11. A canceled check is sent by the bank to its customer showing the account balance at the start of a period, the transactions affecting the account, and the closing balance.
12. A signature card contains customer information which is kept in a bank file.
13. A bank can accept a check with a forged signature.
14. A bank statement lists all cash and checks to be deposited for credit to the depositor's account in the bank.
15. You may write a check out in any color of ink you desire.
16. Checks may be written out in pencil.
17. A check may be postdated.
18. A check that is three years old can still be cashed.
19. A check is returned to the drawer for insufficient funds.
20. A person can stop payment on a check that they have written.
21. Checks are the most valuable paper in the world.
22. Banks cash checks that are improperly dated.

23. Checks are used today to pay bills by both adults and teenagers.
24. A person must be 18 years of age in order to open a checking account.
25. Banks vary in the amount of deposit that is required in order to open an account.

Multiple Choice

1. The clear key identified by a "C", "CE", or "CA" on a calculator is used:
A. To clear the machine
B. To clear the individual entry only
C. To begin a new problem
D. Both A and C
2. When using the touch system on the calculator, the index finger controls the:
A. 2, 8, 5 keys
B. 4, 7, 1 keys
C. 6, 9, 3 keys
D. 1, 4, 9 keys
3. When using the touch system on the calculator, the ring finger controls the:
A. 2, 8, 5 keys
B. 4, 7, 1 keys
C. 6, 9, 3 keys
D. 1, 4, 9 keys
4. When using the touch system on the calculator, the middle finger controls the:
A. 2, 8, 5 keys
B. 4, 7, 1 keys
C. 6, 9, 3 keys
D. 1, 4, 9 keys
5. When placing currency in wrappers one should:
A. Put only 12 items to a wrapper
B. Paper clip the wrapper on the bills
C. Lay each bill of like denominations face up, with pictures on each bill facing the same direction
D. Remember not to write on the wrapper
6. A blank endorsement includes which of the following?
A. For deposit only and the name of the payee
B. Paid to the order of and the name of the person and the name of the payee
C. Only the name of the payee
D. Nothing is written on the back
7. A restrictive endorsement includes which of the following?
A. For deposit only and the name of the payee
B. Paid to the order of and the name of the person and the name of the payee
C. Only the name of the payee
D. Nothing is written on the back

8. A full endorsement includes which of the following?
- A. For deposit only and the name of the payee
 - B. Paid to the order of and the name of the person and the name of the payee
 - C. Only the name of the payee
 - D. Nothing is written on the back
9. When writing out a check one should always use a:
- A. Pencil so you can correct your error
 - B. An erasable pen so you can correct your error
 - C. A permanent ball point pen
 - D. A water base pen
10. When receiving cash from a deposit slip one must remember to:
- A. Tell the teller how much you want
 - B. List it on the form and sign your name in the space provided
 - C. You can't get cash when you are depositing a check
 - D. Write the deduction amount at the top of the deposit slip
11. If you have voided a check you should:
- A. Tear up the check but list the check number in the register with the word "void" written in the description column
 - B. Keep the voided check in the check book
 - C. Tear up the check and forget about listing the number in the check register
 - D. Just throw the check away
12. Which of the following is NOT a way to prepare a check?
- A. Typed
 - B. Check writer
 - C. Handwritten with a pen
 - D. Handwritten with a pencil
13. Which of the following is listed on a deposit ticket?
- A. Cash only
 - B. Check only
 - C. Currency only
 - D. Coins, currency and checks
14. If you make a mistake on a check, you should:
- A. Erase the mistake and rewrite it
 - B. Write VOID by that check number in the register
 - C. Tear up the wrong check and start a new one
 - D. Both B and C
15. When completing a deposit slip, checks are:
- A. Totaled and listed as one check
 - B. Listed separately
 - C. Omitted
 - D. Listed under currency

16. Information which is included with the bank statement is:
- A. Outstanding checks, canceled checks and statement
 - B. Canceled checks, bank statement, reconciliation form
 - C. Check stubs, bank statement and canceled checks
 - D. Reconciliation form, outstanding checks and check stubs
17. The purpose or memo for which a check is written is located on the:
- A. Back of the check
 - B. Top right of the check
 - C. Lower left corner of the check
 - D. Lower right corner of the check
18. When you write a check for less than a dollar the amount should be:
- A. Written in red ink
 - B. Written out with the words "Only ??/100"
 - C. Set off in brackets
 - D. Cannot be done
19. After you have reconciled your bank statement, canceled checks are:
- A. Destroyed right away
 - B. Sent back to the person who cashed it
 - C. Filed along with the bank statement and reconciliation form
 - D. Sent back to the bank
20. Pay to the order of Mary Anne Smith is a:
- A. Restrictive endorsement
 - B. Blank endorsement
 - C. Super endorsement
 - D. Full endorsement
21. A check endorsed with only the words Mary Anne Smith is a:
- A. Restrictive endorsement
 - B. Blank endorsement
 - C. Super endorsement
 - D. Full endorsement
22. A check which has the name and address of the bank customer printed on the face of the check is a:
- A. Cashier's check
 - B. Traveler's check
 - C. Personalized check
 - D. Money order
23. The person who signs the check is the:
- A. Payee
 - B. Payer
 - C. Drawer
 - D. Drawee
24. The person who receives the check is the:
- A. Payee
 - B. Payer
 - C. Drawer
 - D. Drawee

25. The bank or institution making the payment is known as the:

A. Payee
B. Payer

C. Drawer
D. Drawee

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- | | | |
|--------------------------|---------------------------------|------------------------|
| A. Add-mode | I. Outstanding Checks | P. Bank Statement |
| B. Decimal Key | J. Reconciling a Bank Statement | Q. Canceled Checks |
| C. Clear Key | K. Restrictive Endorsement | R. Clearing a Check |
| D. Clear Key | L. Check Stub | S. Deposits in Transit |
| E. Blank Endorsement | M. Credit Balance | T. Endorsement in Full |
| F. Check-Writing Machine | N. Decimal Selector | U. Voiding a Check |
| G. Deposit | O. ABA Numbers | V. Check |
| H. Deposit Slip | | W. Hold |
| | | X. Depositor |

- | | |
|--|---|
| _____ 1. Part of a check kept by person writing check as a record of transaction. | _____ 7. Tells the calculator to automatically register the decimal between dollars and cents; operator does not have to enter decimal with each amount. (Decimal selector set at "+"mode.) |
| _____ 2. The restriction that freezes all or part of the funds in the account for various reasons. | _____ 8. Tearing up a check that has been written incorrectly. |
| _____ 3. Individual, partnership, business proprietorship, corporation, organization, or association placing funds in a bank. | _____ 9. Deposits that were recorded on the amount holder's check register or stub, but were not processed at the bank in time to be on the bank statement. |
| _____ 4. An order in writing, signed by the depositor, ordering the bank to pay cash from the depositor's account to a designated payee. | _____ 10. Identified by "C"; removes (clears) information from the register and readies the calculator to accept a new problem. |
| _____ 5. American bankers association code numbers printed on all checks and deposit slips. | _____ 11. A printed record of all transactions that have taken place in a checking account during the month. |
| _____ 6. A check that has been paid by the bank. The check is then returned to the account holder with the bank statement. | _____ 12. Money put into a bank account. |

- ____ 13. A form the depositor fills out showing the amounts and types of money to be deposited in a bank account.
- ____ 14. A negative balance obtained when the amount subtracted is greater than the amount added; identified by a minus sign (-) in the display, or by a minus sign or the letters CR on the tape.
- ____ 15. An endorsement consisting solely of the signature of the person to whom the check is written.
- ____ 16. An endorsement which restricts the use of the check once it is endorsed. This ensures that the check can be deposited only to the account of the person or company whose identification appears in the endorsement.
- ____ 17. Identified by "."; enters a decimal when depressed.
- ____ 18. A machine used in writing checks that imprints the amount in a distinct type and perforates the paper to ensure against fraudulent alteration of a check.
- ____ 19. A switch, usually with settings from 0 to 4, which allows the operator to preset where the decimal will appear in a final answer.
- ____ 20. The process that takes place from the time the check is deposited until it is paid.
- ____ 21. Another way of expressing "balancing the check book." Process of getting the checkbook balance and the bank's balance to match.
- ____ 22. An endorsement used for transferring a check to another person or company.
- ____ 23. Checks which have been written and recorded on the register or check stub, but which have not cleared the bank in time to be included on the bank statement.

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. A _____ is money in the form of cash or checks added to a customers account.
- _____ 2. The party who transfers a check would properly transfer it by _____.
- _____ 3. A check payable to "bearer" may be transferred by _____.
- _____ 4. A person who writes the words "_____" above his/her name in the endorsement of a check is restricting the use of the funds the check represents.
- _____ 5. An account with a bank by which one can order payments to others from the balance by check is called a _____.
- _____ 6. The number assigned to checking accounts by the bank is called the _____.
- _____ 7. _____ is the fee charged against a depositor's account for services rendered by a bank.
- _____ 8. A _____ is an order in writing, signed by the depositor, ordering the bank to pay cash from the depositor's account to the name listed on the check.
- _____ 9. A _____ gives the bank a sample of the authorized signature of those who may write a check on an account.
- _____ 10. A _____ is sent by the bank to a customer indicating the account balance at the beginning and end of a billing cycle as well as all transactions taking place during that time period.

ESSAY

1. List the nine steps in writing out a check.
 - (1)
 - (2)
 - (3)
 - (4)
 - (5)
 - (6)
 - (7)
 - (8)
 - (9)

2. List at least 5 items that are found on a bank statement.
 - (1)
 - (2)
 - (3)
 - (4)
 - (5)
 - (6)

3. Explain why a check register is kept.

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. T | 9. T | 17. T |
| 2. T | 10. T | 18. F |
| 3. F | 11. F | 19. T |
| 4. T | 12. F | 20. T |
| 5. T | 13. F | 21. T |
| 6. T | 14. F | 22. F |
| 7. F | 15. T | 23. T |
| 8. F | 16. F | 24. F |
| | | 25. T |

Multiple Choice

- | | | |
|------|-------|-------|
| 1. D | 9. C | 17. C |
| 2. B | 10. B | 18. B |
| 3. C | 11. A | 19. C |
| 4. A | 12. D | 20. D |
| 5. C | 13. D | 21. B |
| 6. C | 14. D | 22. C |
| 7. A | 15. B | 23. C |
| 8. B | 16. B | 24. A |
| | | 25. D |

Matching

- | | | |
|------|-------|-------|
| 1. L | 8. U | 16. K |
| 2. W | 9. S | 17. B |
| 3. X | 10. D | 18. F |
| 4. V | 11. P | 19. N |
| 5. O | 12. G | 20. R |
| 6. Q | 13. H | 21. J |
| 7. A | 14. M | 22. T |
| | 15. E | 23. I |

Fill in the Blank

- | | |
|---------------------|--------------------|
| 1. Deposit | 6. Account number |
| 2. Endorsement | 7. Service charge |
| 3. Anyone | 8. Check |
| 4. For deposit only | 9. Signature card |
| 5. Checking account | 10. Bank statement |

Essay

1. 1) Enter the check number, date, payee and the extension figures in the check register or on the check stub.
- 2) If the checks are not prenumbered, enter the next consecutive number for the check in the appropriate space.
- 3) Record the current date in the space labeled "date."
- 4) Enter the name of the payee, the person or company to whom the check is written.
- 5) Insert the amount of the check in figures.

- 6) Spell out the dollar amount in words and use a fraction for any additional cents.
 - 7) Record the purpose of the check.
 - 8) If the account number is not recorded on the check, record that number in the appropriate space.
 - 9) Sign the check on the line in the lower right corner.
2.
 - 1) Beginning balance
 - 2) Date of statement
 - 3) Total number of debits
 - 4) Total number of credits
 - 5) Service charge
 - 6) Ending balance
 - 7) Other transactions that occurred
3. Evaluated to the satisfaction of the instructor.

TRUE AND FALSE

1. Net pay is the money received after deductions.
2. Gross pay does not include overtime.
3. FICA is one of the deductions from gross pay.
4. Federal Income Tax is one of the deductions from net pay.
5. All companies deduct retirement.
6. Many companies allow employees to deduct health insurance as a voluntary deduction.
7. Employees and Employers both pay social security or (FICA) taxes. Each pays the same amount.
8. Overtime is figured at twice the rate of regular salary.
9. Involuntary deductions are FICA and Federal Income Tax.
10. Salaried employees include the executive.

MULTIPLE CHOICE

1. The form that is completed when you begin working indicating exemption.
A. FICA
B. W-2 Form
C. W-4 Form
D. INSF
2. The form that is completed yearly by employers on all their employees showing wages and deductions is called an:
A. FICA
B. W-2 Form
C. W-4 Form
D. INSF
3. Another name for the W-4 form is:
A. Employer's withholding exemption certificate
B. Federal Insurance Compensation Act
C. Employee's earning record
D. Federal Income Tax Withholding Act
4. The total amount of earnings before deductions is known as:
A. New Pay
B. Gross Pay
C. Adjusted Pay
D. Earned Pay
5. The amount a person receives after deductions is:
A. Net Pay
B. Gross Pay
C. Adjusted Pay
D. Earned Pay
6. The categories of employees for payroll information are:
A. Men and women
B. Skilled and unskilled workers
C. Salaried and hourly employees
D. Laborers and production employees
7. Another name for FICA is:
A. Social Security Tax
B. Income Tax
C. State Tax
D. City Tax
8. Another name for Federal Income Tax is:
A. State Tax
B. Social Security Tax
C. Withholding Tax
D. Federal Deduction
9. Two methods of preparing payroll are:
A. Manual and Computer Systems
B. Manual and Calculators
C. Computer Only
D. Calculator Only

10. Information NOT found on the Employees Exemption Certificate is:
- | | |
|-------------------------|---------------------------|
| A. Name and address | C. Wage or salary |
| B. Number of exemptions | D. Social Security Number |
11. A payroll check contains two parts which are given to the employee. They are:
- | | |
|-----------------------|---------------------------|
| A. Check and register | C. Voucher and time sheet |
| B. Check and voucher | D. Check and time sheet |
12. A form used to summarize the payroll information for all employees.
- | | |
|---------------------|------------------------|
| A. Payroll Register | C. W-4 Form |
| B. W-2 Form | D. Individual Register |
13. A person who is paid for services rendered is a(n):
- | | |
|-------------|----------------------|
| A. Employer | C. Unemployed person |
| B. Employee | D. Supervisor |
14. The person/business who pays for services rendered is a(n):
- | | |
|-------------|----------------------|
| A. Employer | C. Unemployed person |
| B. Employee | D. Supervisor |
15. A form used for recording the hours an employee works is a(n):
- | | |
|------------------|-------------|
| A. Time card | C. W-2 Card |
| B. Employee card | D. W-4 Card |
16. If you are earning \$12.80 per hour, your overtime salary would be:
- | | |
|------------|------------|
| A. \$20.10 | C. \$19.40 |
| B. \$19.20 | D. \$18.80 |
17. If you are being paid \$4.50 per hour and you worked 40 hours, your gross salary would be:
- | | |
|-------------|-------------|
| A. \$190.00 | C. \$185.00 |
| B. \$180.00 | D. \$188.00 |
18. If you are being paid \$3.75 per hour and you worked 48 hours, your gross salary would be:
- | | |
|-------------|-------------|
| A. \$195.04 | C. \$196.00 |
| B. \$195.00 | D. \$200.00 |
19. You receive a yearly salary of \$28,850. What is your weekly salary?
- | | |
|-------------|-------------|
| A. \$554.80 | C. \$550.00 |
| B. \$548.07 | D. \$545.00 |

OSS/Testbank/Section VII
Unit 2: Payroll and Tax Reporting

20. You are being paid a monthly salary of \$2,758.50. What is your yearly salary?
- | | |
|-------------|-------------|
| A. \$34,000 | C. \$33,102 |
| B. \$33,000 | D. \$33,202 |
21. You receive a base salary of \$1,000 a month plus 10% commission on your sales. This month you made sales totaling \$45,000. What is your commission?
- | | |
|------------|------------|
| A. \$4,000 | C. \$4,600 |
| B. \$4,500 | D. \$4,400 |
22. Using the facts from the preceeding question, what would your gross salary be?
- | | |
|------------|------------|
| A. \$5,000 | C. \$5,600 |
| B. \$5,500 | D. \$5,400 |
23. You receive \$660 biweekly. What is your yearly salary?
- | | |
|-------------|-------------|
| A. \$17,100 | C. \$17,260 |
| B. \$17,160 | D. \$17,166 |
24. If you have worked your 40 hours and are asked to work on a federal holiday, most companies will pay:
- | | |
|--------------------|------------------------|
| A. Time and a half | C. Double Time |
| B. Overtime | D. Your Regular salary |
25. If you are being paid \$6.25 per hour, what would be your rate of pay if you were being paid double time for a holiday?
- | | |
|------------|------------|
| A. \$12.00 | C. \$12.25 |
| B. \$12.50 | D. \$12.75 |

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided.

A.	Employee	K.	Employee's	P.	Time cards
B.	Employer		withholding	Q.	W-4 form
C.	Federal		exemption	R.	Ten-key
D.	FICA		certificate		Keyboard
E.	Gross pay	L.	Federal	S.	Discount
F.	Net pay		Income	T.	Credit balance
G.	Salaried		Taxes		
	employees	M.	Form 1040		
H.	W-2 form	N.	Hourly		
I.	Home row		employees		
J.	Touch method	O.	Payroll register		

- | | |
|--|--|
| <p>____ 1. The middle row of keys (4,5,6) on a ten-key keyboard.</p> <p>____ 2. Person/business who pays individuals/businesses for services rendered.</p> <p>____ 3. A form used to summarize the payroll information for all employees.</p> <p>____ 4. A negative balance obtained when the amount subtracted is greater than the amount added.</p> <p>____ 5. Another term for employee's withholding exemption certificate.</p> <p>____ 6. A keyboard arrangement in which there are ten numeric keys (1-9) arranged in three rows of three keys each, with an additional key or bar (0) at the bottom of the last row.</p> <p>____ 7. A form used to file income and tax with the federal government.</p> | <p>____ 8. A progressive tax (increases with income) imposed by the federal government made on income after any deductions.</p> <p>____ 9. A form used to indicate marital status and number of exemptions for use in determining payroll deductions.</p> <p>____ 10. A means of operating a ten-key keyboard by touch rather than sight.</p> <p>____ 11. An amount subtracted from a regular price.</p> <p>____ 12. The total amount earned by an employee before taxes or other deductions are taken from it.</p> <p>____ 13. An individual's earnings after deductions have been taken out.</p> |
|--|--|

OSS/Testbank/Section VII
Unit 2: Payroll and Tax Reporting

- _____ 14. A form completed yearly by employers on all their employees showing the wages for the preceding year, amount of income, tax withheld, FICA wages paid, and other related information.
- _____ 15. A person who receives pay or salary for services rendered.
- _____ 16. A form used for recording the hours an employee works.
- _____ 17. Persons paid a set amount of money each week or month.
- _____ 18. Persons paid wages according to the number of hours they work each week; paid a certain amount for each hour.
- _____ 19. Commonly referred to as the Social Security tax which provides pensions for retired persons, provides survivors benefits for dependents of insured workers that are disabled or dead, and provides hospital and medical insurance to those persons over the age of 65.
- _____ 20. Pertaining to the U.S. government.

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. _____ is what an employee earns.
- _____ 2. _____ is the amount of salary after deductions.
- _____ 3. Time and a half is paid for _____.
- _____ 4. A _____ indicates how many hours a person worked during a time period.
- _____ 5. A _____ is paid a set amount of money each week.
- _____ 6. An _____ receives pay or salary for services rendered.
- _____ 7. _____ pertains to the U.S. government.
- _____ 8. _____ workers are paid wages according to the number of hours worked each week.
- _____ 9. A _____ is used to summarize the payroll information for all employees.
- _____ 10. Regular salary added to overtime salary gives you the _____ pay.

ESSAY

1. List the four items found on a W-4 form.
 - (1)
 - (2)
 - (3)
 - (4)

2. Name four voluntary deductions that may be deducted and explain each.
 - (1)
 - (2)
 - (3)
 - (4)

3. What is the difference between the manual and computer system of preparing payroll?

ANSWERS

True and False

- | | | |
|------|------|-------|
| 1. T | 4. F | 7. T |
| 2. F | 5. F | 8. F |
| 3. T | 6. T | 9. F |
| | | 10. T |

Multiple Choice

- | | | |
|------|-------|-------|
| 1. C | 9. A | 17. B |
| 2. B | 10. C | 18. A |
| 3. A | 11. A | 19. A |
| 4. B | 12. A | 20. C |
| 5. A | 13. B | 21. B |
| 6. C | 14. A | 22. B |
| 7. A | 15. A | 23. B |
| 8. C | 16. B | 24. C |
| | | 25. B |

Matching

- | | | | |
|------|-------|-------|-------|
| 1. I | 6. R | 11. S | 16. P |
| 2. B | 7. M | 12. E | 17. G |
| 3. O | 8. L | 13. F | 18. N |
| 4. T | 9. K | 14. H | 19. D |
| 5. Q | 10. J | 15. A | 20. C |

Fill in the Blank

- | | |
|----------------------|---------------------|
| 1. Wages | 6. Employee |
| 2. Net pay | 7. Federal |
| 3. Overtime | 8. Hourly employee |
| 4. Time card | 9. Payroll register |
| 5. Salaried employee | 10. Gross |

Essay

1.
 - 1) Name and address
 - 2) Social Security number
 - 3) Marital status
 - 4) Number of exemptions

2.
 - 1) Health and hospitalization insurance
 - 2) Group life insurance
 - 3) Disability insurance
 - 4) Retirement funds accounts
 - 5) Savings bonds
 - 6) Union dues
 - 7) Deposits to savings

3. Evaluated to the satisfaction of the instructor.

COMPETENCY MATRIX OF TEST BANK QUESTIONS

SECTION VII

SECTION VII		QUESTION TYPES				
Unit	Comp.	T/F	MC	Match	Fill-in	Essay
1	1	1-5	1-4	7,10,14,16,19		
	2	9,12,13,15-25	6,12,20-25	3-6,8,15,16,18,21	1-9	1
	3A	6	5,6,7,13,15,20,21,	12,13,15,16,22		
	3B	7,8	14,18,22	2		1
	3C	10	17	1,9		3
	3D	11,14	16,19	11,21,23	10	2
	4				10	
2	1	1-10	1-7,9,11-25	1-6,9-20	1-10	1-3
	2	4	2,8,10	7,8,14		

TRUE AND FALSE

1. Oral communication and mental communication are the two ways language is used to communicate.
2. The way words are sounded is referred to as the tone of words.
3. Rhetoric refers to the way words are put together.
4. Language usage consists only of rhetoric and grammar.
5. Rhetoric is the selection of words needed to convey a message.
6. Language usage is considered from two points of view: proper language usage and improper language usage.
7. It is important to know the meaning of a word before it is used.
8. Correct spelling of words is the first skill to apply when using proper oral language.
9. Correct articulation is the first skill to apply when using proper written language.
10. It is important that we plan written communication very carefully because our written words have to imply our feelings and attitudes.
11. Proper language usage promotes confidence in the use of the English language and enhances self-esteem.
12. Proper language usage makes a knowledgeable employee but slows productivity.
13. Using proper language skills increase chances for a career in business.
14. Improper language usage cannot be overcome.
15. Complete sentences are not necessary for properly written language.
16. Punctuation is extremely important for written language.
17. Correct verb tense denotes time.
18. You cannot have a singular subject and a singular verb.
19. If you have a plural subject you must use a plural verb.
20. Proper language usage can enhance self-esteem.
21. Language skills are mirrors into our character and personality.
22. Business executives are the only people who need to communicate effectively.

MULTIPLE CHOICE

1. There are ____ major skills for properly using oral language.
A. 2
B. 3
C. 4
D. 5
2. There are ____ major skills for properly using written language.
A. 8
B. 9
C. 10
D. 11
3. Language usage consists of all of the following EXCEPT:
A. Legibility
B. Grammar
C. Rhetoric
D. Tone of words
4. In oral language, one of the most important skills to use is:
A. Correct articulation
B. Correct spelling
C. Complete sentences
D. Correct punctuation
5. In written language, one of the most important skills to use is:
A. Complete sentences
B. Correct spelling
C. Correct punctuation
D. All of the above
6. When we refer to the way words are put together, we are referring to:
A. Articulation
B. Grammar
C. Rhetoric
D. Subject-verb agreement
7. As we select certain words to convey a message, we are using:
A. Articulation
B. Grammar
C. Rhetoric
D. Subject-verb agreement
8. The way we pronounce our words is referred to as:
A. Articulation
B. Grammar
C. Rhetoric
D. Subject-verb agreement

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided. (Some words may be used more than once.)

- | | |
|----------------------------|---------------------|
| A. Articulation | E. Language usage |
| B. Grammar | F. Oral |
| C. Improper language usage | G. Rhetoric |
| D. Language | H. Written language |

- _____ 1. The selection of words needed to convey a message.
- _____ 2. Communication.
- _____ 3. The way words are put together or organized.
- _____ 4. Consists of grammar, rhetoric, and tone.
- _____ 5. Pronouncing words clearly.
- _____ 6. One way language is used to communicate.
- _____ 7. One of the two ways to communicate is oral language and the other is _____.
- _____ 8. Results when we are not efficient with rhetoric and grammar skills.
- _____ 9. When used properly the results can be seen in personal and business life.
- _____ 10. Can cause misunderstandings.

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. There are two main areas in our lives in which proper language skills play an important role, they are _____ and _____.
- _____ 2. Oral language and written language are both examples of the way we _____ with each other.
- _____ 3. _____ consists of grammar, rhetoric, and tone.
- _____ 4. _____ refers to the way words are put together or organized.
- _____ 5. Oral communication is also referred to as _____ communication.
- _____ 6. _____ and _____ skills are needed to meet the demand of the modern business world.

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ACTIVITIES

1. To stress the importance of communicating with others verbally, start a statement on one side of the room and have each student whisper the message to his neighbor and compare the ending statement with the beginning statement.
2. Insert the letter(s) to complete the following paragraph.

_n _ beautiful s_nny aft_rnoon, Kelly _nd Lynn dec_ded t_ take _ stroll along
th_ b_ach. Th_ water w_s cold _s _t hit the_r fee_. S_rfers w_r _r_d_ng th_
w_ves _s the_r_lled _n and s_ilboats were driftin_. _s the s_n b_g_n t_ s_nk,
th_ waves c_lmed _nd s_l_nce f_ll _p_n th_ b_ach.

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. F | 9. F | 16. T |
| 2. T | 10. T | 17. T |
| 3. F | 11. T | 18. F |
| 4. F | 12. F | 19. T |
| 5. T | 13. T | 20. T |
| 6. T | 14. F | 21. T |
| 7. T | 15. F | 22. F |
| 8. F | | |

Multiple Choice

- | | | |
|------|------|------|
| 1. D | 4. A | 7. C |
| 2. C | 5. D | 8. A |
| 3. A | 6. B | |

Matching

- | | | |
|------|------|-------|
| 1. G | 5. A | 8. C |
| 2. D | 6. F | 9. E |
| 3. B | 7. H | 10. C |
| 4. E | | |

Fill in the Blank

- | | | |
|--------------------------|-------------------|-------------------------|
| 1. Personal and business | 3. Language usage | 5. Verbal |
| 2. Communicate | 4. Grammar | 6. Speaking and writing |

Essay

1.
 - a. Correct articulation of words
 - b. Correct subject-verb agreement
 - c. Correct verb tense
 - d. Correct case
 - e. Know the meaning of a word before using it

2.
 - a. Correct subject-verb agreement
 - b. Correct verb tense
 - c. Correct case
 - d. Know the meaning of a word before using it
 - e. Correct use of punctuation
 - f. Use complete sentences
 - g. Avoid run-on sentences
 - h. Correct use of adjectives and adverbs
 - i. Correct spelling of words
 - j. Plan written communication very carefully

3. Evaluated to the satisfaction of the instructor.

Activities

1. Suggested sentence:

Sally was seen shopping at Ridge Town Mall with John and they were wearing matching red sweaters.

2. On a beautiful sunny afternoon, Kelly and Lynn decided to take a stroll along the beach. The water was cold as it hit their feet. Surfers were riding the waves as they rolled in and sailboats were drifting. As the sun began to sink, the waves calmed and silence fell upon the beach.

TRUE AND FALSE

1. One advantage of written communication over oral communication is that it provides a permanent record.
2. One disadvantage of written communication over oral communication is that it costs a lot to send.
3. Written communication allows the reader and writer to think about the information contained in the letter.
4. Face-to-face and telephone communication is faster than written communication.
5. When planning a letter, you should first develop an outline of ideas to be included in the letter.
6. When composing letters, you should always consider the purpose of the letter.
7. Written communication is less formal than oral communication.
8. Developing an outline of ideas is the first step in planning a letter.
9. Reading through examples of other letters helps you understand how your employer wants letters to be written.
10. An advantage of written communications over oral communications is that face-to-face communication is faster.
11. In order to communicate intelligibly and understandably you must know who your audience is.
12. The fewer parts a report has, the more formal it becomes.
13. The "you" attitude keeps the writer's attitude in mind.
14. One purpose of written communication is to promote a desired result.
15. The skilled writer knows how to write material that gives complete information without being wordy.
16. The purpose of any paragraph can be accomplished in one to ten sentences.
17. Use a variety of sentence structures in each message so the message will be grammatically correct.
18. After correspondence has been written and typed, proofread it carefully.
19. A positive response letter accomplishes the same purposes as a goodwill letter.
20. All letters should contain at least three paragraphs to effectively convey a message.

MULTIPLE CHOICE

1. A letter that thanks someone for a favorable action is a:
A. Goodwill letter
B. Negative response letter
C. Positive response letter
D. Request letter
2. A letter that asks someone to provide a particular service is a:
A. Goodwill letter
B. Negative response letter
C. Positive response letter
D. Request letter
3. A letter that grants a request by another person is a:
A. Goodwill letter
B. Negative response letter
C. Positive response letter
D. Request letter
4. A letter that promotes a favorable impression about your company is a:
A. Goodwill letter
B. Negative response letter
C. Positive response letter
D. Request letter
5. A letter that denies a request by another person is a:
A. Goodwill letter
B. Negative response letter
C. Positive response letter
D. Request letter
6. Communication that begins with specific objectives and moves toward a more general objective is said to be:
A. Complete
B. Concise
C. Deductive
D. Inductive
7. In the planning stage of writing, the first step should be to:
A. Organize a rough draft
B. Organize your thoughts
C. Organize an outline of ideas
D. Organize your notes
8. Communication problems occur when information is:
A. Complete
B. Deductive
C. Inductive
D. Misspelled
9. Additional information located at the end of a report is called a(n):
A. Appendix
B. Index
C. Synopsis
D. Title fly

10. A listing of the title report is a(n):
- | | |
|-------------|--------------|
| A. Appendix | C. Synopsis |
| B. Index | D. Title fly |
11. A summary of a report is a(n):
- | | |
|-------------|--------------|
| A. Appendix | C. Synopsis |
| B. Index | D. Title fly |

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided.

- | | | |
|------------------|---------------------|-----------------------|
| A. Appendix | H. Deductive | O. Synopsis |
| B. Authorization | I. Formal Report | P. Title Fly |
| Letter | J. Goodwill | Q. Transmittal Letter |
| C. Clear | K. Inductive | R. Visual Aids |
| D. Complete | L. Informal Reports | S. Written |
| E. Concise | M. Letter | Communication |
| F. Correct | N. Memorandum | T. You Attitude |
| G. Courteous | Report | |

- | | |
|--|--|
| _____ 1. Illustrations, charts, and graphs. | _____ 10. Begins with the specific objective/purpose, and moves toward more general information. |
| _____ 2. Additional information located at the end of a report. | _____ 11. Supplying all the necessary data in order for the information to be understood. |
| _____ 3. Communication that is intelligible or understandable. | _____ 12. Message from the author to the reader. |
| _____ 4. Long reports with several parts. | _____ 13. Begins with general information, and moves toward the specific objective/purpose. |
| _____ 5. A short report written in letter form to someone outside a company. | _____ 14. Data is accurate and current. |
| _____ 6. Keeping in mind the reader's point of view, and putting the reader's interests first. | _____ 15. The summary of a report. |
| _____ 7. Communicates ideas and promotes desired results. | _____ 16. A favorable impression that businesses seek to create. |
| _____ 8. Message that assigns responsibility of writing a report to the author. | _____ 17. Text that consists of the fewest and most straightforward words possible. |
| _____ 9. A listing of the title of the report. | _____ 18. Polite, considerate, and thoughtful, as expected by businesses when their employees deal with customers. |

- | | | | |
|-----------|---|-----------|---|
| _____ 19. | Short reports in various forms. | _____ 22. | Encourages good relations and cooperation. |
| _____ 20. | Short report in the form of a memo which is used for interoffice communication. | _____ 23. | Validate and up-date facts before finalizing a document. |
| _____ 21. | A message that gets right to the point. | _____ 24. | Know who the audience is, know what information must be communicated. |
| | | _____ 25. | Evaluate information to make sure it answers any question that might arise. |

FILL IN THE BLANK

INSTRUCTIONS: Fill in the appropriate word or words in the blank provided.

- _____ 1. The purposes of written communication are to communicate ideas and to promote _____.
- _____ 2. Before writing a letter, you should _____ your thoughts.
- _____ 3. Text that consists of the fewest and most straightforward words possible is _____.
- _____ 4. In letter writing, the tone of your writing should have the _____ attitude.
- _____ 5. Data that is accurate and current is said to be _____.
- _____ 6. _____ are a good source for showing someone what you mean.
- _____ 7. A business letter that begins with a specific purpose and moves toward more general information is said to be _____.
- _____ 8. A business report that is twenty pages long and contains fifteen different subheadings is a _____ report.
- _____ 9. A beginning office worker needs to gain experience in written communication in order to contribute to the _____ of the business office.
- _____ 10. The purpose of _____ is to communicate ideas and to promote desired results.
- _____ 11. A _____ is a summary of a report.
- _____ 12. Clear messages are arranged _____.

ESSAY

1. List the five C's of letter writing and briefly describe each.

(1)

(2)

(3)

(4)

(5)

2. List the hints for writing business letters and briefly describe each.

ANSWERS

True and False

- | | | |
|------|-------|-------|
| 1. T | 7. F | 14. T |
| 2. F | 8. F | 15. T |
| 3. T | 9. T | 16. F |
| 4. T | 10. F | 17. F |
| 5. F | 11. T | 18. T |
| 6. T | 12. F | 19. F |
| | 13. F | 20. T |

Multiple Choice

- | | | |
|------|------|-------|
| 1. A | 4. A | 8. D |
| 2. D | 5. B | 9. A |
| 3. C | 6. D | 10. D |
| | 7. B | 11. C |

Matching

- | | | | | |
|------|-------|-------|-------|-------|
| 1. R | 6. T | 11. D | 16. J | 21. E |
| 2. A | 7. S | 12. Q | 17. E | 22. G |
| 3. C | 8. B | 13. H | 18. G | 23. F |
| 4. I | 9. P | 14. F | 19. L | 24. C |
| 5. M | 10. K | 15. O | 20. N | 25. D |

Fill in the Blank

- | | | |
|--------------------|----------------|----------------------------|
| 1. Desired results | 5. Correct | 9. Productivity |
| 2. Organize | 6. Visual aids | 10. Written communications |
| 3. Concise | 7. Inductive | 11. Synopsis |
| 4. You | 8. Formal | 12. Logically |

Essay

1.
 - a. Complete - make sure all necessary data is present
 - b. Clear - communicates so message is understood
 - c. Correct - data is current and true
 - d. Concise - a message that gets right to the point
 - e. Courteous - a message that is polite, considerate, and thoughtful

2.
 - a. Plan ahead - know what you want to say
 - b. Be concise - get right to the point
 - c. Use transitions - message flows smoothly
 - d. Use the "You" attitude - keep the reader in mind at all times
 - e. Emphasize the positive - always use positive language
 - f. Converse with the reader - write as if you were speaking to the reader
 - g. Vary sentence structures - keep the reader's interest
 - h. Keep paragraphs short - 1 to 5 sentences
 - i. Maintain goodwill - never be short or sarcastic
 - j. Assure correctness - proofread carefully

TRUE AND FALSE

1. Centrex is an organization, such as the telephone company, that is authorized by the FCC to offer communication services.
2. Telephone service is NOT regulated by the government.
3. AT&T was previously the primary service agency, but now some small private companies are offering the same services.
4. The call director is the person who regulates the company's calls.
5. Cellular phone service first started in 1983.
6. Long distance file card is a form used to record specific information regarding a long-distance telephone call.
7. First-generation PBXs used software to direct calls automatically and began carrying data traffic.
8. Third-generation PBXs handled routine voice/data transmission.
9. Some of the features of a PBX are call holding, call forwarding, and automatic callback.
10. Centrex services offer only limited services.
11. You cannot use your credit card when you use DDD.
12. When making a collect call, the person that is being called must accept the charges before the call can go through.
13. Wide area service (WATS) is the 900 service.
14. WATS is a cost-effective way for businesses to operate.
15. Tie-line service connects two sites and allows unlimited calls to be made between two locations for a set fee.
16. When using the telephone, it is important to project a good telephone image.
17. When spelling a name to a caller, the name should be spelled very slowly so that the caller will understand.
18. After you take a message, read the message back to the caller to be sure that the message is correct.
19. ZIP Codes cannot be found in a telephone book.
20. You do not have to log long-distance telephone calls because the calls will show up on the monthly bill.

MULTIPLE CHOICE

1. Which of the following is NOT an example of special equipment for the telephone?
A. Touch tone telephone
B. Videophone/picture phone
C. Personal signalers or pagers
D. Centrex
2. An example of special telephone features would be:
A. Call waiting
B. Speed dialing
C. Conference calls
D. All of the above
3. The different types of telephone services are:
A. Direct-distance dial (DDD)
B. Wide area telecommunications service (WATS)
C. International calls using space satellites
D. All of the above
4. An example of a pronunciation/articulation technique would be:
A. Speak very slowly
B. Chew gum while speaking
C. Talk directly into the receiver
D. Do not vary the tone of your voice
5. When creating a good telephone image, all of the following is important EXCEPT:
A. Showing a sincere interest in the caller
B. Returning calls whenever you feel like it
C. Being tactful
D. Using good vocabulary
6. Which of the following is not an example of the phonetic alphabet?
A. Apple for A
B. Ida for I
C. Nellie for N
D. Zebra for Z
7. Which of the following is NOT part of the telephone directory?
A. Directory assistance
B. Introductory pages
C. Alphabetic pages
D. Classified section
8. The number(s) for directory assistance is(are):
A. 1411
B. (Area code) 555-1212
C. Both A and B
D. None of the above

9. Why are telephone records needed?
- A. For proper reimbursement of long-distance calls
 - B. For proper charging of long-distance calls
 - C. Because records are helpful in double-checking the accuracy of telephone bills, estimating telephone expenses, or for justifying telephone expenses
 - D. All of the above
10. A switched line is:
- A. A line such as a normal telephone line
 - B. The connection between the sender and the receiver
 - C. A telephone feature available for purchase that allows the user to enter a code that will automatically forward all incoming calls to another phone number
 - D. None of the above
11. If you were in Los Angeles and it was 11:00 a.m., what time would it be in Dallas?
- A. 12:00 p.m.
 - B. 1:00 p.m.
 - C. 10:00 a.m.
 - D. 9:00 a.m.
12. If you were in Washington, D.C. and it was 4:00 p.m., what time would it be in Denver?
- A. 5:00 p.m.
 - B. 12:00 p.m.
 - C. 2:00 p.m.
 - D. 3:00 p.m.
13. Where would you look in the telephone directory if you were looking for a physician?
- A. Introductory pages
 - B. White pages
 - C. Yellow pages
 - D. None of the above
14. Where would you look in the telephone directory if you were looking for a ZIP Code?
- A. Introductory pages
 - B. White pages
 - C. Yellow pages
 - D. None of the above
15. A characteristic of the key telephone system is:
- A. It is a self-contained switching system between incoming calls, outgoing calls, and calls between offices
 - B. Buttons light up when the phones are in use
 - C. It needs a central switchboard
 - D. None of the above

16. A characteristic of a cellular phone is:
- A. Service first started in 1983
 - B. It is becoming more reasonably priced
 - C. The costs involved include a basic charge of \$20 per month, and usage varies from 35 to 55 cents per mile
 - D. All of the above
17. A characteristic of the PBX and PABX is:
- A. It is not self-contained
 - B. Some can handle up to 10,000 lines
 - C. These systems are controlled manually
 - D. Software cannot be used with these systems
18. A characteristic of voice messaging is:
- A. It allows a telephone system to receive messages
 - B. It cannot be used with a computer
 - C. It is like the PBX system
 - D. None of the above
19. A characteristic of a speakerphone is:
- A. It is similar to electronic mail
 - B. Only one person may use this at a time
 - C. It allows the user to answer the telephone without lifting the receiver
 - D. All of the above
20. A characteristic of a personal signaler or pager is:
- A. It is often called a beeper
 - B. It is small and portable
 - C. Both A and B
 - D. None of the above
21. A characteristic of an intelligent dialer is:
- A. It is equipped to dial numbers automatically
 - B. It eliminates looking up numbers
 - C. It saves dialing time
 - D. All of the above
22. A characteristic of a touch tone telephone is:
- A. It is slowly replacing the dial phone
 - B. It can be used for sending dictation
 - C. Both A and B
 - D. None of the above
23. A characteristic of a videophone is:
- A. It has gained prominence in the last 25 years
 - B. The person who is calling can be seen and heard
 - C. The monitor cannot be turned off
 - D. All of the above

24. Extended area service:
- A. Provides an inexpensive rate for long-distance calls made within a designated area
 - B. Allows businesses to pay for only the services they use
 - C. Allows many people at different locations to talk together
 - D. None of the above
25. Call queuing:
- A. Allows one call to be put on hold while receiving an incoming call
 - B. Selects the most economical route for the call to be processed
 - C. Allows the person calling to wait on a busy extension until it is free
 - D. None of the above
26. Camp-on:
- A. Allows immediate access to a busy line immediately after the line is free
 - B. Allows one call to be put on hold while receiving an incoming call
 - C. Allows the person calling to wait on a busy extension until it is free
 - D. Allows the caller stay on the line as long as possible
27. Measured service:
- A. Selects the most economical route for the call to be processed
 - B. Measures the length of each call
 - C. Measures the amount of calls coming in and going out
 - D. Allows businesses to pay for only the services they use
28. WATS:
- A. Means wide area telephone service
 - B. Can place an unlimited number of calls for a single monthly charge
 - C. Both A and B
 - D. None of the above
29. Tie-line:
- A. Allows a company to receive a call from anyone in the service area
 - B. Allows the caller to charge to another number
 - C. Uses satellites to make connections
 - D. Allows an unlimited number of calls to be made between two locations for a set fee
30. What do you consider when you plan to make a call?
- A. When is the party available?
 - B. When is the party's lunch hour?
 - C. What is the party's time zone?
 - D. All of the above

MATCHING

INSTRUCTIONS: Place the appropriate letter in the blank provided

- A. Beeper
- B. Cellular phone
- C. Centrex
- D. Conference call
- E. Direct-distance dial
- F. Direct outward dial
- G. Extended area service

- H. FCC
- I. Key telephone service
- J. Speaker-phone
- K. Station-to-station
- L. Touch tone phone
- M. Voice messaging
- N. WATS
- O. White pages

- _____ 1. Buttons light up when the phones are in use.
- _____ 2. Phone service first started in 1983.
- _____ 3. Allows the user to answer the telephone without lifting the receiver.
- _____ 4. It uses the local telephone company's central exchange.
- _____ 5. Similar to electronic mail.
- _____ 6. Is rapidly replacing the traditional dial telephone.
- _____ 7. Provides an inexpensive rate for long-distance calls made within a designated area.
- _____ 8. Does not require operator assistance.

- _____ 9. 800 service.
- _____ 10. An alphabetic listing of all persons and businesses within a specific area.
- _____ 11. Allows several persons at different locations to speak to each other at the same time.
- _____ 12. Costs less than any other call.
- _____ 13. Allows outside calls to be made by first dialing an access number.
- _____ 14. Personal signalers or pagers.
- _____ 15. Governing agency for telephone service.

FILL IN THE BLANK

INSTRUCTIONS: Place the appropriate word or words in the blank provided.

- _____ 1. The connection between the sender and the receiver.
- _____ 2. The transmission of data for electronic storage and subsequent retrieval.
- _____ 3. Form used to record specific information regarding a long-distance telephone call.
- _____ 4. Coded identification required to access some bulletin boards and information services.
- _____ 5. A line such as a normal telephone line.
- _____ 6. The electronic transmission of information, whether it be voice or data.
- _____ 7. Worldwide teletypewriter networks.
- _____ 8. A special service, available for purchase, allowing a fixed charge to be paid for any number of long-distance calls within a WATS area, rather than paying for each long-distance call individually.
- _____ 9. A conference that through the use of a bridge, allows from three people to hundreds to converse from different locations.
- _____ 10. A phone switching-system in which users can choose between dialing directly and using the operator's assistance.
- _____ 11. An organization, such as the telephone company, that is authorized by the FCC to offer communication services.
- _____ 12. Method of placing long-distance telephone calls by following specific dialing instructions that do not require the assistance of an operator.
- _____ 13. A type of telephone system in which the telephones have several buttons (or keys) that light up when the phones are in use.
- _____ 14. A small, portable device that alerts the person carrying it when someone is trying to reach her or him by telephone; often called a beeper.

- _____ 15. Form used to record information pertaining to all long-distance telephone calls placed by an organization or department in a one-month period.
- _____ 16. A conference conducted over the telephone among people in widely separated locations, or a conference among people at different locations linked electronically.
- _____ 17. Telephone connections that tie two telephones together directly; users are charged a fixed monthly rate, and are generally used between the main office and a branch office.
- _____ 18. A computer with software and storage dedicated to communicating with other computers over telephone lines.
- _____ 19. Special telephone service available for purchase that provides a short tone signal indicating that a second call is on the line while you are on the phone with the first caller.
- _____ 20. A telephone call that allows 2 to 50 people in different geographic locations to be connected on one telephone line simultaneously so they can participate in the same conversation.
- _____ 21. Special service, available for purchase, permitting station-to-station, long-distance calls to be made to an organization without charge to the caller.
- _____ 22. Long-distance telephone call which requires assistance from the operator to complete the call.
- _____ 23. A telephone system consisting of an operator-controlled switchboard that is the central switching station for all the telephone extensions in an office.
- _____ 24. A combination microphone and loud-speaker device attached to a telephone which is designed so that many people can hear a telephone call together.
- _____ 25. A keyboard device with a printer that can send and receive messages over telephone lines, or a special machine, a form of telegraph similar to a typewriter, that is capable of both sending and receiving telegraphic messages.
- _____ 26. A telephone feature available for purchase that allows the user to enter a code that will automatically forward all incoming calls to another phone number.

OSS/Testbank/Section VIII
Unit 3: Telephone Skills

- _____ 27. Long-distance telephone call in which the person or firm receiving the call agrees to pay the charge for the call.
- _____ 28. A feature of an automated, private branch exchange which makes it possible to make outside calls directly by dialing an access number first.
- _____ 29. An operator-assisted, long-distance telephone call before which the caller requests a particular person or extension.
- _____ 30. Long-distance telephone call which must be dialed directly; charges begin when the telephone is answered.

ESSAY

1. List the six (6) items that should be included in a message.
 - (1)
 - (2)
 - (3)
 - (4)
 - (5)
 - (6)

2. List and then briefly explain three (3) different telephone systems and give an example of each.
 - (1)
 - (2)
 - (3)

3. List and briefly explain five (5) different special telephone features.
 - (1)
 - (2)
 - (3)
 - (4)
 - (5)

ANSWERS

True and False

1. F
2. F
3. T
4. F
5. T
6. T
7. F

8. T
9. T
10. F
11. F
12. T
13. F
14. T

15. T
16. T
17. F
18. T
19. F
20. F

Multiple Choice

1. D
2. D
3. D
4. C
5. B
6. A
7. A
8. C
9. D
10. A

11. B
12. C
13. C
14. A
15. B
16. D
17. B
18. A
19. C
20. C

21. D
22. B
23. B
24. A
25. C
26. A
27. D
28. C
29. D
30. D

Matching

- | | | |
|------|-------|-------|
| 1. I | 6. L | 11. D |
| 2. B | 7. G | 12. K |
| 3. J | 8. E | 13. F |
| 4. C | 9. N | 14. A |
| 5. M | 10. O | 15. H |

Fill in the Blank

- | | |
|---------------------------------------|-----------------------------|
| 1. Channel | 16. Teleconference |
| 2. E-mail | 17. Tie lines |
| 3. Long distance file card | 18. Bulletin board |
| 4. Password | 19. Call waiting |
| 5. Switched line | 20. Conference call |
| 6. Telecommunications | 21. Inward WATS |
| 7. Telex | 22. Operated-assisted call |
| 8. Wide area telephone service (WATS) | 23. Private branch exchange |
| 9. Audio teleconferencing | 24. Speakerphone |
| 10. Centrex | 25. Teletype writer |
| 11. Common carrier | 26. Call forwarding |
| 12. Direct-dial calls | 27. Collect call |
| 13. Key system | 28. Direct outward calling |
| 14. Paging device | 29. Person-to-person call |
| 15. Register of long-distance calls | 30. Station-to-station call |

Essay

1.
 1. Time and date of the call
 2. Complete name of caller and the company represented
 3. Telephone number of the caller, including the area code and extension
 4. What action to take
 5. Important details of the message
 6. Your initials or signature
2. Evaluated to the satisfaction of the instructor.
3. Evaluated to the satisfaction of the instructor.

COMPETENCY MATRIX OF TEST BANK QUESTIONS

SECTION VIII

SECTION VIII		QUESTION TYPES				
Unit	Comp.	T/F	MC	Match	Fill-in	Essay
1	1	1,3,4	3,6	1,3,4	3-5	1
	2	2,5,6,8-10,15-19	1,2,7,8	2,5,6,9		1,2
	3	7,11-14,20-22	4,5	7,8	1,2,6	
2	1	1-4,7,10,14	6-8	3,10,13,16 17,22	1,9,10	
	2	12,19	1-5	8	8	1,2
	3	5,6,8,9,11,13 15-18		6,7,11,12,14, 18,21,23,24	2-7,12	1,2
	4	20	9-11	1,2,4,5,9,15, 19,20,25	11	2
3	1	2,3	8	15	1,6,7,11	
	2	1,4,5,7-10	10,15-19	1-3,5	5,10,13, 23-25	2
	3		1,20-23	6,14	14	
	4		2,24-27	4,7,13	9,16,18-20, 26,28	3
	5	11-15	3,28,29	8,9,11,12	2,4,8,12,17, 21,22,27,29, 30	
	6	17,18	4,6			
	7	16-18	5,11,12,30			1
	8	19	7,13,14	10		
	9	6,20	9		3,15	

COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

- (1) acceptance policies on student transfers from other school districts;
- (2) operation of school bus routes or runs on a non-segregated basis;
- (3) nondiscrimination in extracurricular activities and the use of school facilities;
- (4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;
- (5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;
- (6) nondiscriminatory practices relating to the use of a student's first language; and
- (7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964; EXECUTIVE ORDERS 11246 AND 11375; TITLE IX, 1973 EDUCATION AMENDMENTS; REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; AND VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulations by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs or activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.